

— Centerprising Journey —

Live Guided Experiences Online



The Family Constitution: Family Unity & Decision-Making

— JOURNEY DESCRIPTION —



The Family Constitution: Family Unity & Effective Decision- Making

Understand why family unity is essential for effective decision-making and growing your family's collective wealth. Learn about the family constitution as the primary tool for family unity and how to develop one. The journey will guide participants to develop an action plan to build family unity.

6 or 12-week expert-guided journey online:

1. Initial guided articulation of goals
2. Weekly learning materials and 1-hour guided group discussions via video
3. Design personal action plan

US\$ 3,800 per participant for 6-week journey with weekly dialogue
US\$4,800 for 12-week journey with dialogue every other week

Who is this journey for?

- RisingGen who desire transparent processes and clear expectations for effectively managing the family enterprise
- Senior Generation who want to minimize conflict and foster collaboration among RisingGen family members
- Trusted Advisors of the Family who want to help the business family achieve wealth creation success
- Non-Family Executives who desires clear decision-making structure to make their jobs easier

What is the journey experience?

Our philosophy is to provide bite size, guided, practical learning in a directed way that leads to developing concrete, implementable action plans.

Initial articulation of goals. At launch, we hold a 1-on-1 session with you to help you articulate your challenges and turn them into a list of solvable, prioritized problems. You select one problem to address. Then focus on developing an action plan for that problem thru the journey.

Insights into Family Governance. We send you weekly learning materials. They provide frameworks and case samples to direct your data gathering, analysis, and action plan design. We hold weekly 1-hour dialogues in small groups to review learning highlights, discuss your reflections, guide your action planning, and for the group to share experiences.*

Customized creation of personal action plans. At the end of the journey, we hold a 1-on-1 session with you to polish your action plan and ensure that it can help you achieve concrete goals.

* We would answer any questions on learning materials and provide feedback on self-reflections + action plans in between dialogues



Curriculum for Journey

The Family Constitution: Family Unity & Decision-Making

1 WEEK 01

Building blocks of the family constitution and its importance in family unity

- a. Key governance mechanisms and policies in the family constitution, including the Values, Mission, and Vision
- b. How the family constitution builds and supports family unity

2 WEEK 02

Defining your business family and your unique challenges in building unity

- a. What criteria would you use/are you using to determine who are members of your business family?
- b. Identify unique challenges your family faces in building/maintaining unity

3 WEEK 03

The Family Council and the Family Assembly

- a. Introduce the two key structures of family governance
- b. Draft designs of/modifications to your family's family governance structures

4 WEEK 04

Distribution policy and joint ownership

- a. Issues to be considered when determining annual distributions to family shareholders or beneficiaries
- b. Appropriate extent of joint ownership and decision making over assets

5 WEEK 05

Conflict of interest Policy and conflict resolution mechanism

- a. Common types of conflicts of interest
- b. Common conflict resolution mechanisms
- c. Draft designs of/proposed changes to your family's policies and mechanisms

6 WEEK 06

Putting it all together: draft designs of or suggested modifications to your family constitution

- a. How to gather family input and support for your draft designs or suggested modifications?
- b. What other issues should be addressed in your family constitution?

Sample Case for The Family Constitution: Family Unity & Effective Decision-Making

INITIAL CHALLENGE

- ❖ Publicly listed company owned by well known multi-generational family in luxury goods under threat of hostile takeover by competitor
- ❖ Family leaders decided to counter this hostile takeover attempt

COMPLICATIONS

- ❖ Family shares are separately owned by various family branches
- ❖ Family leaders need to build a controlling block of family ownership to counter the takeover threat

DID THE FAMILY PREVAIL?

- ❖ Were the family leaders able to build the controlling family ownership block?
- ❖ What strategies did they deploy?

How did unity help family leaders counter the threat of hostile takeover attempt to the family's benefit?

How to join:

- ❖ If you are interested in registering for this journey, please visit our website at

www.centerprising.io

- ❖ Journeys start monthly
- ❖ Journey Fees Per Participant:
 - US\$ 3,800 for 6-week journey with weekly dialogue
 - US\$ 4,800 for 12-week journey with dialogue every other week
- ❖ For inquiry, please click on the button below or send us an email:

[INFO REQUEST](#)

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