



with James E. Hughes
& Dave Specht

SESSION 5

MONITORING LIABILITIES OF GENERATIONAL WEALTH

Acquire assets, not liabilities. Learn to say no to stuff that does not matter.
- Tan Suee Chieh

WHAT YOU WILL LEARN

1. How to identify liabilities to generational wealth
2. How to avoid or minimize the impact of these liabilities
3. Most liabilities are connected to our choices

REFLECTIONS

What are the biggest perceived impediments to perpetuating generational wealth in your family?

In what ways can you proactively identify weaknesses and minimize their downside risk?