

INTENTIONAL FAMILY WEALTH

A Conscious Leadership Intensive

with Sue Heilbronner and Scott Peppet

June
10-11

Conversations around family wealth are frequently undermined by ego, secrecy, anxiety, or defensiveness. Complex emotional and motivational issues obscure shared goals and aspirations. It doesn't have to be that way. You can shift that dynamic.

The Intentional Family Wealth program offers you a rare opportunity to engage in a conscious, authentic, confidential, and truly transformative inquiry about wealth and your relationship to it. This two-day immersive forum offers the coaching insights and tools you need to jumpstart an intentional and integrated approach to the myriad personal and familial issues underpinning family wealth and generational wealth transfer.

The program is led by Sue Heilbronner, a highly sought-after Conscious Leadership coach, and Scott Peppet, a thought leader and President of a multi-generational family office and trust company. By working with Sue and Scott, participants will acquire immediate, actionable, game-changing skills of Conscious Leadership, as well as invaluable coaching and candid feedback in service of reaching their highest possible level of success in work and life.

This intensive also offers participants an opportunity to engage with like-minded and similarly situated individuals who are committed to authenticity. Being in conversation with a curated group of peers on a topic we rarely directly face is a unique and meaningful opportunity to learn and practice principles of a conscious approach to family wealth.

THE FACILITATORS



Sue Heilbronner is a sought-after speaker, startup CEO, mentor, adjunct professor of entrepreneurship, facilitator, strategic advisor, Conscious Leadership coach, co-founder of the MergeLane investment fund, creator of the Leadership Camp training program for high-potential leaders, former federal prosecutor, and a direct and fearless catalyst for change. She has worked with the leaders of world-class companies such as Apple, Google, and G2. Learn more about Sue at HeySue.com.



Scott Peppet is the President of the multi-generational family office and private trust company that serves the family of the iconic entrepreneur Sam Zell, a Board member for both private and public companies, a well-known writer and speaker in the family wealth space, a facilitator of difficult but generative conversations for corporate and family leaders, a former law professor, an expert on negotiation and conflict, and a lifelong Zen practitioner. Learn more about Scott at ScottPeppet.com.

THE "WHY"

Based on their work in Conscious Leadership and with the myriad dynamics of family wealth, Scott and Sue are developing this two-day forum to allow families to make some key shifts in service of greater impact and personal satisfaction:

- **Shifting from Obligation to Opportunity:** Helping family members integrate and deploy their resources for their own and the world's benefit.
- **Shifting from Secrecy to Intentional Transparency:** Convening authentic conversations about stuff that matters most.
- **Shifting from Drama to Presence Around Wealth:** Developing skills and a mindset required to build a highly relational, integrated, conscious family-centered office.

THE "WHAT"

- This program is comprised of two all-day sessions.
- The intensive will be remote and attendance from start to finish is mandatory for the integrity of the program and cohort.



"The combination of Sue and Scott makes for deep, vulnerable, transformative conversations about money, family, and leadership."

THE "WHO"

- Family members – no advisors – who do or will at some point control or benefit from significant family business assets or wealth
- Age 25+
- Game to take conscious responsibility for their influence in the world as leaders
- Committed to curiosity, value learning over being right, and open to giving and receiving feedback

THE DIFFERENCE

There are many programs that cater to family stakeholders, leaders, and inheritors. This opportunity is different because it is grounded on a deep foundation of Conscious Leadership skills, tools, and frameworks. Participants will learn and deploy these concepts alongside others who understand the unique challenges and opportunities of wanting to be intentional stewards of family capital. The goal is to learn to show up authentically, to develop a group IQ/EQ with shared intent, and then turn that to the particular issues of family wealth, family business, and family leadership.

THE INVESTMENT

\$4,000 per person for the two-day program.

THE "WHEN"

The two-day program takes place Thursday, June 10 (9am-5pm MT) and Friday, June 11 (9am-4pm MT).