PROFESSIONAL ADVISOR RESOURCE

Family Facilitation in Integrated Wealth Management

An Advisor's Guide to Recognizing When Outside Help Is Needed and Introducing It to Clients

Revised edition • November 2026

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Edelman & Associates

Practical guidance, case exercises, sample communications, and tools for professional judgment.

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About this guide

A family office advisor notices that succession meetings keep ending without a decision. Everyone says the transition is important. The founder wants to step back; the next generation wants more responsibility; the professional team has prepared the necessary documents. Yet each time a decision approaches, someone raises another concern and the family postpones it.

The advisor wonders whether an outside facilitator could help. Then a second question arises: *How do I suggest that without making the family think we can't handle the work?*

This guide addresses both questions. It helps advisors examine what may be preventing progress, decide what they can do within their own roles, and determine whether additional expertise would be useful. It includes conversation examples, practice cases, sample communications, an engagement outline, and a short decision guide.

These are tools for exercising professional judgment. Family circumstances differ, and the explanations people initially give for their difficulties may not reveal what is keeping them stuck. They are intended for education and adaptation; engagement terms should be reviewed by the appropriate legal and professional advisors.

An important measure of success is the extent to which families and their advisors become more capable of addressing the decisions and responsibilities that lie ahead. An outside professional may help with an immediate difficulty while also creating opportunities for the people involved to develop their own judgment.

A useful starting question: *What are we seeing, what might explain it, and what do we still need to understand?*

1. Recognizing when the existing approach may no longer be enough

The need for outside help often becomes apparent before anyone can name it. Meetings are repeatedly rescheduled. A planned transition keeps getting another prerequisite. A successor seems capable in private conversations but says little in meetings with a parent. An advisory team finds itself carrying messages among family members who no longer speak directly to one another.

Such observations deserve attention. They are clues about what to explore, and the same pattern may have several explanations.

Watch for patterns such as these:

- **Decisions that repeatedly reopen.** The family reaches agreement in one meeting, then discovers that an important participant understood the agreement differently.
- **Authority that is clear on paper but contested in practice.** A successor has a formal title but must still seek approval for decisions apparently delegated to them.
- **Information that moves unevenly.** Some family members know much more than others, or technical documents have been signed without a shared understanding of their implications.
- **A process that depends on one person's cooperation.** A founder, trustee, sibling, or advisor can stop progress without explaining what would make the process workable.
- **Advisors becoming intermediaries in family relationships.** A relationship manager spends more time interpreting family members' motives or carrying messages than applying their own professional expertise.

- **A beneficiary-education initiative that never begins.** Senior family members, younger beneficiaries, and advisors all endorse the idea, but none takes the next step.

An advisor may be able to address some of these issues within the existing team. Others require someone who can work across relationships, roles, and competing perspectives with sufficient independence and relevant skill.

Consider a family that has endorsed beneficiary education for two years without launching a program. Before calling this a project-management failure, ask what starting the program would change for each party. Elders may be giving up some control over information; beneficiaries may be giving up the option of remaining uninvolved; family office staff may be asked to deliver work outside their training. Each possibility deserves exploration. The family may agree on the importance of education while hesitating over its implications.

2. Examine the difficulty before choosing the intervention

Consider a father who has appointed his son president of the family business. The son approves a significant equipment purchase. Concerned about cash flow, the father instructs the plant manager to stop the order. The son sees the intervention as a repudiation of his authority. The father sees it as responsible oversight.

The family says it has a succession problem. That description is plausible, but incomplete. There may be no agreement on capital-spending authority. The father may distrust the son's judgment. The two may hold different assumptions about market conditions. Or a pattern of interference may have made it difficult for the son to develop the very experience his father says he lacks.

Before prescribing a solution, examine six aspects of the situation.

Objectives. What is each person trying to accomplish, protect, prevent, or avoid? People usually care about several outcomes, even when they articulate only one. Agreement on a broad goal—"a successful succession"—may conceal different priorities about growth, security, control, or continuity.

Authority. Who is entitled to decide? Has authority been delegated explicitly? Is the allocation accepted in practice?

Information. What facts and assumptions are participants using? Who has relevant knowledge that has not been brought into the discussion?

Capability. What experience, judgment, or interpersonal skill does the situation require? What opportunities exist to develop it?

Relationships. How are trust, fairness, longstanding grievances, or expectations affecting the interpretation of current events?

Decision process. What happens when people disagree? Can competing perspectives be examined, or does the group avoid the subject, defer to power, or return repeatedly to settled questions? Avoiding a difficult conversation can provide immediate relief while increasing the likelihood of more serious conflict later.

Three questions help connect an understanding of the difficulty to practical action:

1. **What must this family become capable of doing that it has not had to do, or has not been able to do, before?**

2. **What existing structures or arrangements make that difficult?**
3. **What structures, systems, or opportunities for practice are missing that would make it easier?**

The answers may point toward a small change: clearer authority for a successor, a process for disagreement, regular reporting, or experience making decisions with feedback. Start with the least elaborate arrangement that will help the family do the work it wants to accomplish. Further structure can emerge as experience reveals where it would help.

These questions can also be asked of the advisory team. Have we heard from everyone affected? Are we treating our preferred solution as the client's objective? What might change our assessment? Is our reluctance to bring in help connected to our own uncertainty about a task we have not been trained to perform?

When discomfort narrows awareness

People develop familiar ways of coping with unpleasant feelings early in life. One person may seek greater control; another may withdraw, defer, or challenge someone else's authority. These responses can become more pronounced when the person feels threatened or uncertain. Over generations, family members may develop through identification with or opposition to earlier generations, yet continue to be influenced by the same underlying concerns. Treat these as possibilities to explore, not conclusions about a person's motives.

When anxiety, frustration, or other unpleasant feelings become intense, awareness can narrow around a single concern. A client may lose sight of other desired outcomes that are important to them. As the consequences of a proposed change become more concrete, the concerns that had been less evident earlier may come to dominate the conversation.

Pay attention to how well people can think while emotions are present. Someone may be upset and still able to consider alternatives. Another person may appear calm while refusing to entertain any new possibility. The key is whether participants can examine the question together.

An empathic response can help relieve enough discomfort for someone to become curious again. Acknowledge the concern in terms the client recognizes, allow time for a response, and then explore what else the client hopes to accomplish or protect. When the client is ready, help them examine the implications of their alternatives. Empathy does not require agreeing with the client's position or endorsing a proposed action.

Resistance can emerge from the interaction between an advisor and a client. An advisor who presses for agreement when a client is apprehensive may increase the very reluctance the advisor is trying to overcome. The advisor's own anxiety about losing a client, appearing incompetent, or failing to reach a decision may also narrow awareness. A useful question in a stalled conversation is: What might I be doing that makes it harder for this person to engage?

3. Match the help to the work

The word *facilitator* is sometimes used for a wide range of services. The relevant question is what capabilities the family needs and which professional, or combination of professionals, can provide them.

If the family needs help with...	Consider...	A point to check
Working through a consequential discussion among several people	**Facilitation**	Can the professional remain independent of the participants' preferred outcomes and manage a productive process?
Developing a leader's capacity to exercise responsibility	**Executive or leadership coaching**	Is the person given real opportunities to exercise the authority they are being coached to use?
Understanding beneficiary roles, trusts, ownership, or financial decisions	**Education and guided practice**	Will participants have opportunities to apply what they learn?
Resolving a defined dispute through a negotiated agreement	**Mediation**	Are the parties willing and able to participate, and is the dispute appropriate for mediation?
Designing governance, succession structures, or business strategy	**Specialized consulting and technical advisors**	Are the structures addressing the causes of the problem, or only its visible symptoms?
Addressing significant mental-health needs	**An appropriately licensed clinician**	Are safety, scope of practice, and referral arrangements being handled appropriately?

Several forms of expertise may be needed. A facilitator may help family members work through different assumptions about authority while an attorney prepares governance documents. A coach may help a successor develop leadership judgment while the owners establish decision rights. Technical advisors remain responsible for their own legal, tax, investment, valuation, or fiduciary work.

The temptation is to choose a specialist as soon as a problem becomes recognizable. A more useful first step may be a limited assessment or exploratory conversation, especially when the source of the difficulty is uncertain.

4. Decide whether to involve an outside professional

A useful internal discussion addresses four questions.

What work remains undone? Name the decisions, relationships, or capabilities that need attention. “The family has poor communication” is too vague to define an engagement.

Why might the existing team have difficulty doing it? The team may lack the requisite skills, the time, a sufficiently independent role, or the trust of all affected participants. Sometimes an advisor has become so identified with one family member’s position that convening everyone neutrally would be difficult. Consider whether the team has been accommodating a pattern of avoidance because challenging it might make the client or the advisors uncomfortable.

What would a useful first step accomplish? It may be enough to conduct confidential exploratory interviews, clarify authority, or hold one facilitated meeting. A larger program can be designed after more is known.

Who should participate in deciding? The person who retains and pays the professional may not be the only person affected. Other participants need to understand their role, what they are being asked to do, and what information will be shared.

Three reasonable outcomes

Continue internally: the need is clear, the existing team has the skills and standing to address it, and participants are making progress.

Consult before committing: the source of difficulty is uncertain, and a qualified outside person could help assess the situation without presuming what intervention will follow.

Engage outside help: a defined need calls for skills, independence, or a process that the current team cannot adequately provide.

If family members hesitate to involve someone new, find out what concerns them. One may fear exposure; another may worry that a facilitator will side with the person who proposed the engagement. A careful conversation about those concerns can help people decide whether they are ready to proceed. An initial expression of interest warrants further exploration before an engagement is designed.

5. Introducing outside facilitation to the client

The advisor's existing relationship is often one of the strongest resources the family has. Introducing someone else should build on that trust.

Begin with observations the client can recognize. Explain what has prompted your concern and invite the client's understanding of the situation.

Before recommending a new professional, explore the client's other objectives. For example, a founder who has appointed a successor may insist on retaining approval of purchases because of concerns about cash flow. An advisor could acknowledge the concern and invite a broader view:

> "I can understand why you want to protect the company's cash position. What else would you like to see happen as your son takes on more responsibility? What would you like him to become capable of doing?"

As those objectives emerge, the advisor can help the founder consider how retaining approval authority might affect the son's opportunities to develop judgment. The next step may be a clearer delegation arrangement, a conversation with the successor, or help from a facilitator. The appropriate choice depends on what is learned.

Example: succession meetings that go nowhere

> "We've made progress on the legal and financial planning. I notice that when we reach the question of which decisions your son will make independently, the conversation becomes difficult and we put it off. How do you understand what's getting in the way?"

Listen carefully. The family may understand the situation in ways you have yet to hear.

> "There are several ways we could approach this. One option would be to involve someone experienced in helping families work through questions of authority and expectations. We would continue handling the planning work, and together we'd

agree on what the additional person would be asked to do. Would it be useful to discuss that possibility?"

The client may ask, "Why can't you do it yourselves?"

> "We can continue to help with the financial and planning decisions. This part of the work calls for someone who can concentrate on how the family reaches those decisions, including perspectives we may not have heard. We think that could make our own work more useful."

Or the client may say, "I don't want a stranger telling us how to run the family."

> "I wouldn't want that either. The family would still make its own decisions. We'd be looking for someone who could help everyone examine the issues and understand the implications. Before making any introduction, we'd talk with you about how that person works and what you'd want from the engagement."

A client may also respond to governance proposals with, "This sounds like bureaucracy." It is worth treating that as information about what the client wants to preserve. An advisor could answer: "I don't want to introduce more process than you need. Which decisions are difficult today, and what's the smallest change that would make them easier?" A governance model can be a useful reference later; it need not lead the conversation.

These examples illustrate how an advisor can approach a sensitive conversation. Use your own words, drawing on what you know about this family and giving the client room to decide how to proceed.

What to avoid

Avoid diagnosing family members in order to justify a referral. "Your son is resistant" or "Your sister is narcissistic" rarely helps a family understand the problem. Avoid promising that a neutral facilitator will produce agreement, eliminate conflict, or make difficult feelings disappear. And avoid introducing an outside professional before clarifying whether the existing team is seeking support for the family or relief from its own discomfort.

6. Establish a working relationship that clients can trust

Before an engagement begins, the family, existing advisors, and outside professional should understand how they will work together.

Purpose and scope. What decisions or capabilities are the focus of the engagement? What will be outside its scope? How will everyone recognize progress?

Roles and authority. Who is the client? Who engages and pays the professional? Who decides which family members participate? Which responsibilities remain with attorneys, trustees, accountants, wealth advisors, or family office staff? A trustee's fiduciary judgment cannot be transferred to the family office by calling that office the "coordinating hub."

Preserving agency. Clarifying decision authority is only part of the work. Even when someone else has lawful authority to decide, as with a discretionary trustee, those affected may have opportunities to understand the decision process, articulate their objectives, provide relevant information, and consider implications. Respect the governing arrangements and applicable duties when identifying these opportunities. Where people can appropriately exercise responsibility for themselves, avoid arrangements that unnecessarily deprive them of practice.

Independence. The facilitator's role may depend on being trusted by people who hold opposing views. The original advisory team should not assume that the facilitator will advocate for its preferred outcome or report privately on individual family members.

Confidentiality and information sharing. Agree in advance what information may be disclosed, to whom, and with whose consent. Individual conversations may require different arrangements from group meetings. The engagement should not imply that paying for the work gives the sponsor automatic access to everything said in confidence.

Participation and boundaries. Specify expectations for respectful conduct, the handling of threats or intimidation, and the circumstances in which a meeting may be paused or the engagement ended. Empathy toward a distressed participant does not require others to tolerate harmful behavior.

Review and adaptation. Agree on an initial scope and a time to assess progress. The process may change as additional facts emerge. Judge the work by the changes it helps participants make, using the agreed objectives as a reference.

When the family has several branches or advisory systems

As families expand, members may share ownership and history while wanting different levels of contact, involvement, or financial coordination. The task is to identify which decisions require joint action, what each branch can decide independently, and which arrangements will support both autonomy and continuing obligations. A desire for independence can reflect a legitimate change in circumstances.

An engagement may span a single-family office, an outside multi-family office, and trustees or technical specialists with separate obligations. Before accepting work, clarify which institution has retained you, whose information you may receive, which decisions belong to whom, and how information will cross boundaries. A specialist engaged by one branch cannot presume the right to represent or speak for another. Where interests are materially divergent, independent advice may be necessary.

Family composition also evolves. Marriages, partnerships, divorce, remarriage, adoption, and cross-cultural relationships can affect who participates, who holds legal rights, and how people understand family membership. Ask about the people, relationships, and legal arrangements in this family rather than relying on customary assumptions.

7. Discussing the investment

Clients may ask why they should pay for another advisor when they already have an experienced team. The most useful answer connects the proposed work to an identifiable problem and a realistic outcome.

For example, when a family has repeatedly postponed the transfer of operating authority, prolonged uncertainty may be expensive in its own right. Facilitation may help the family establish workable decision rights and begin using them. The outcome can be useful even when some participants remain disappointed.

Possible outcomes worth discussing include decisions that are implemented, fewer unresolved questions returning to each meeting, more reliable communication among owners and advisors, or beneficiaries who can demonstrate understanding of responsibilities they will

actually assume. Consider also whether the family and its advisory team are becoming more capable of handling comparable situations without ongoing dependence on the facilitator.

Avoid claims that facilitation prevents litigation, guarantees harmony, or ensures preservation of wealth. Families may continue to disagree. A worthwhile goal is for them to understand those disagreements and develop more effective ways of addressing them.

8. Training advisors: five practice cases

Use these cases in groups of three, or in pairs if necessary. One person plays the relationship advisor, one the client, and, in a group of three, one observes. Allow ten minutes for the client conversation and five minutes for debriefing. Then replay a difficult moment using a different approach. Change roles for the next case.

For each case, the advisor should first decide what needs to be understood before proposing an outside professional. The observer should watch for whether the advisor listens, acknowledges the client's concerns, explores other desired outcomes, distinguishes observation from interpretation, and preserves the client's freedom to decide. The person playing the client can describe which responses made it easier or harder to consider alternatives.

Case 1 — The silent son

A 68-year-old business owner is updating her estate plan and intends to name all three adult children as co-trustees. In planning meetings, the two older children ask questions and express opinions. The youngest son says almost nothing. The owner wants the documents completed before year-end and tells the advisor that the youngest is simply "not interested in money."

In a private conversation, the youngest son says he does not want to disappoint his mother but worries about serving as trustee alongside siblings who frequently disagree with him. He has not told her this.

Practice questions: What has the advisor learned, and what remains unknown? What else might the mother want for her children? Who needs to be heard before the plan is finalized? How could an outside professional be introduced without labeling the son as a problem?

Case 2 — Philanthropy without participation

Parents in their fifties have established a family foundation. They hope their two adult children will learn to make shared decisions through philanthropy. At meetings, the children participate minimally. Their parents describe them as unmotivated.

One child says privately that the parents have already chosen the causes and become irritated when other possibilities are raised. The other child is unsure whether participation is voluntary or expected.

Practice questions: What does each participant hope to accomplish or protect? How might the parents' responses to disagreement affect the children's willingness to participate? Is the problem education, governance, authority, or something else? What would a useful exploratory conversation look like?

Case 3 — The entrepreneurial heir

A young adult whose family owns several successful businesses asks the family office to finance a new venture. The proposal is ambitious, but the financial assumptions are thin. His parents

want to support him and are concerned about repeating past bailouts. The investment advisor is being drawn into arguments about fairness and motivation.

Practice questions: What would help distinguish a sound investment decision from a family relationship problem? What learning opportunities could be designed for the aspiring entrepreneur? If a coach or facilitator is proposed, what responsibilities would remain with the investment team?

Case 4 — The disconnected trustee

Following a transition in trustee arrangements, a cousin living in another state has taken responsibility for a family trust. The cousin appears technically competent and responds promptly to the advisors, but beneficiaries say their requests go unanswered. The relationship manager has begun relaying complaints and explanations among the parties.

The trustee says the beneficiaries want information they are not entitled to receive. The beneficiaries say they simply want to understand how decisions are made.

Practice questions: What is known about the trustee's duties and communication practices? What perspectives are missing? How could beneficiaries exercise greater agency while respecting the trustee's authority? Would the first step be technical clarification, a facilitated conversation, or another approach?

Case 5 — Different futures for the cousins

Three cousins inherited equal interests in a group of commercial properties. One wants to reinvest proceeds from a recent sale; another needs liquidity for a new business; the third wants to remain invested but no longer wishes to participate in monthly joint meetings. Their advisor proposes a formal family investment committee. Two cousins regard the proposal as a way to preserve joint control. The third hears it as another obligation from which there is no exit.

Practice questions: Which choices require collective decisions because of ownership or contractual obligations? Which could be made independently? What would help the cousins examine alternatives without prejudging that all three must stay together? If separate advisers become involved, how should information and roles be handled?

Debrief the advisor's judgment

Ask observers to describe particular moments in the conversation. What concern seemed to occupy the client's attention? Did the advisor help make other objectives accessible? When did either participant become more or less curious? Did the advisor's responses make the conversation easier or harder? What new information emerged? Would the proposed next step still make sense if one assumption turned out to be wrong?

Ask the advisor what they were experiencing during the difficult moment. What did they want to accomplish, avoid, or protect? What changed when they tried a different response? After the replay, identify one behavior to practice in an actual client conversation. In the next team meeting, revisit what happened and what was learned.

9. Sample client communications

These short emails can open or confirm a conversation. The more consequential discussion usually belongs in person or by phone, where the advisor can hear the client's concerns and respond. Adapt the language to the family's actual circumstances.

A. Introducing the possibility of facilitation

Subject: A thought about our next family meeting

Hi [Name],

In our last two meetings, we've been able to clarify several planning questions, but the discussion about [specific issue] remains unresolved. I'm wondering whether someone with experience facilitating difficult family decisions could help us understand the different concerns and find a workable way forward.

We would remain responsible for [our existing role]. Before making any introduction, I'd like to hear how you see the situation and what you would want from additional help.

Would you be open to discussing it at our next meeting?

Best,
[Advisor]

B. Succession and decision authority

Subject: Next steps in the leadership transition

Hi [Name],

We've made progress on the succession documents. The continuing difficulty seems to be how decisions will be made while [founder] is stepping back and [successor] is assuming more responsibility.

It may be useful to have a facilitator work with those involved on expectations, decision rights, and how disagreements will be handled. Our team would continue the legal and financial work, coordinated with that process.

I'd welcome a conversation about whether this would help and who should take part.

Best,
[Advisor]

C. Rising-generation preparation

Subject: Preparing the next generation for future decisions

Hi [Name],

You mentioned wanting the younger family members to understand the responsibilities that will come with their future roles. We could begin by asking them what they already know, what decisions they expect to face, and where they would like more experience.

There may be value in bringing in an educator or facilitator who can help turn those questions into a practical learning plan. I'd like to explore that possibility with you before proposing any program.

Best,
[Advisor]

D. Disagreement among family members

Subject: A possible way to move our discussion forward

Hi [Name],

The disagreements about [issue] have made it difficult to reach a decision, and I don't think we've yet heard everyone's understanding of what is at stake.

One option is to ask an independent facilitator to help the family examine the different perspectives. That person would not decide the matter for you. Our team would continue to advise on the technical questions within our responsibilities.

Would you be willing to talk about how such a conversation might be organized?

Best,
[Advisor]

E. Inheritance or sudden wealth

Subject: Support with the decisions ahead

Hi [Name],

You've had to absorb a great deal of information in a short period of time, and several important decisions are approaching. You've also mentioned questions about how these changes may affect your family and your own plans.

Alongside our financial work, there may be value in speaking with someone experienced in helping people examine the personal implications of major wealth transitions. We can discuss what kind of help, if any, you would find useful.

Best,
[Advisor]

F. Philanthropic decisions

Subject: The next foundation discussion

Hi [Name],

The family has several ideas about where the foundation should focus its giving. Before choosing projects, it might help to clarify how family members want to participate, what they hope the giving will accomplish, and how decisions will be made when preferences differ.

A facilitator with experience in family philanthropy could help structure that discussion. If you're interested, we can consider the scope together and decide whether an introduction makes sense.

Best,
[Advisor]

10. Sample engagement outline for an independent facilitator

Use this outline to clarify scope and responsibilities. Have appropriate legal counsel prepare or review the binding engagement agreement.

Parties and sponsor
This engagement is between [facilitator/firm] and [individuals, family entity, or other identified client]. [Sponsor] will be responsible for payment under the terms below. The parties will clarify the capacity in which the sponsor acts and the interests of other participants.

Purpose
The engagement will help the participants address [specific questions or decisions]. Initial work will include [interviews, exploratory meetings, or review of agreed materials]. The approach and scope may be revised by mutual agreement as more is learned.

Services
The facilitator may conduct individual or group conversations, design and facilitate meetings, identify themes, help participants examine alternatives and consequences, and document agreed next steps. Deliverables, if any, will be specified in advance.

Roles and decision-making
The family and other authorized parties remain responsible for their decisions. [Advisory firm] retains responsibility for [legal, financial, tax, governance, or other work]. The facilitator does not act as the advocate of a particular family member or professional team.

Confidentiality and information sharing
Before individual interviews begin, the facilitator will explain how information from those conversations may be used or shared. No participant should assume that confidential statements will be reported to the sponsor or advisory firm. Any exceptions, including legal obligations or agreed safety protections, will be addressed in the governing agreement.

Coordination
The parties will determine what coordination is appropriate among the facilitator, the existing advisory team, and family members. Information sharing will be limited to what is authorized and useful for the engagement.

Professional boundaries
The facilitator will not provide regulated legal, tax, investment, or mental-health services unless qualified and separately engaged to do so. Procedures for disruptive or unsafe conduct and for suspending or ending the engagement will be agreed.

Fees and review
Fees will be [hourly/project/other], with [billing terms]. After [initial milestone or date], the parties will review progress, expenses, continued need, and any proposed change in scope. Either party may end the engagement under the agreed termination terms.

11. One-page explanation for client families

Why an outside facilitator may be useful

Some family decisions involve competing objectives, different assumptions, and uncertainty about who has authority to decide. Technical advice may clarify the options while leaving those questions unresolved. An outside facilitator can help participants examine them together.

What the facilitator would do

Depending on the agreed scope, the facilitator may speak with participants individually, organize family meetings, help clarify issues, and support discussions about alternatives and consequences. The facilitator does not decide what the family should do.

How the existing advisors remain involved

Your attorneys, accountants, wealth advisors, trustees, and other professionals continue performing their established roles. The facilitator's work is coordinated with them as appropriate. Everyone should know in advance what may be shared and what will remain confidential.

What to expect at the outset

The first stage is usually exploratory. Participants and the facilitator establish the questions to be addressed, who should be involved, and how progress will be assessed. A larger process can be designed after the immediate needs are clearer.

How we will evaluate the work

We'll look at whether the family is developing a clearer understanding of the issues, making and implementing decisions, and becoming better able to address future disagreements. Progress may include a clearer account of remaining differences and a workable process for resolving them. We will also consider whether family members are more confident and capable in exercising the responsibilities that belong to them.

12. A concise decision guide

If you observe…	First ask…	A possible next step
A repeated stalemate	What decision is being avoided? What concerns or competing objectives remain unexamined?	Clarify the decision and participants; consider a facilitated assessment
A successor who appears unprepared	What responsibilities have they actually been allowed to exercise?	Assess developmental opportunities; consider coaching or guided practice
Strong emotion in meetings	Is the person still able to consider alternatives? What has become threatening?	Acknowledge the concern; explore other objectives when the person is ready; consider specialized help if needed
Advisors carrying messages among family members	Why are direct conversations not occurring?	Explore a structured, independent conversation
Repeated requests to "tell us what to do"	What context do we lack, and whose perspective is missing?	Explore objectives and implications; clarify who decides before offering advice
Advisors feeling out of their depth	Which capability or independent role is missing?	Consult or engage a complementary specialist

Before making an introduction

- Describe the specific difficulty in observable terms.
- Check your understanding with those involved; ask what you may have missed.
- Consider how your own responses may be influencing the family's willingness to engage.
- Identify the expertise or independence the current team lacks.
- Explain the proposed role in language the family can use.
- Clarify participation, confidentiality, coordination, fees, and review points.
- Leave room for the family to decide whether and how to proceed.

About the author

Paul Edelman, PhD, PCC, is an executive coach and family enterprise advisor whose work focuses on consequential decisions, leadership transitions, governance, and the development of judgment. He works with families, family offices, and their professional advisors when technically sound plans encounter difficulties involving authority, relationships, leadership capacity, or competing objectives.

He earned a BS in Physics from MIT and a PhD in Developmental Psychology from Harvard University. He is a faculty member of the Ultra High Net Worth Institute and has published on beneficiary preparedness, family enterprise leadership, and decision-making.

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