CONTINUITY

ADVISOR COLLABORATION

# Working With Trusted Advisors

## Helping Good Advice Take Hold

Trusted advisors to enterprising families provide critical expertise and guidance. But sometimes, even great advice encounters obstacles rooted in family dynamics that stall progress and can threaten the advisory relationship.

The family may not be ready. Family members may see the situation differently. Competing interests may get in the way. Or differences may have escalated into conflict, distracting family members from implementing needed planning.

Continuity helps advisors understand what is preventing progress and create a path forward.



## ADVISOR COLLABORATION

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### Behind the Scenes

**Sometimes moving the work forward starts with a better understanding of the family dynamics at play.**

We work privately with you to sort through different perspectives and interests and identify what may be getting in the way.

Together, we can think through how to approach different stakeholders, make your advice more relevant to them, and prepare for difficult conversations.

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### Side by Side

**Sometimes the family needs additional support.**

We work alongside you and your team to understand and manage client complexity that can derail the work you are responsible for. You bring your professional expertise. We bring our experience in family dynamics, conflict management, and systemic problem solving.

Together, we help the family build the understanding and decision making capacity needed to move forward.

03

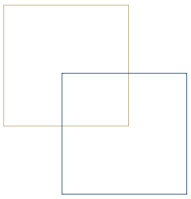
### Temporary Handoff

**Sometimes the family needs to work through conflict, a significant transition, or crisis before other work can move forward.**

Continuity can step in directly, following the evidence to understand what is preventing progress and helping the family develop a path forward.

We help the family return to your advice better prepared to make decisions and move forward.

## Strengthen Your Team



**Continuity provides education in family dynamics, conflict management, and Wealth Integration.**

We help advisors understand the broader family system so they can remain relevant across generations, branches, roles, interests, and values, and communicate their expertise in ways that resonate with multiple stakeholders.

Behind the scenes, side by side, or directly with the family, Continuity helps remove the barriers that keep good advice from moving forward.

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