

L3 Family Retreat Thoughts

1. Consider the Environment for the retreat (not an office)
2. Logistics
 - Put them in writing
 - Schedule free time
 - Budget
 - Provide agendas & Retreat folders
 - Provide note paper and pens
 - Have easel size post-its and markers available
 - Division of labor
 - Attire
3. Seek input from participants before setting the agenda.
4. Try to get others to assume some of the responsibilities (finding place to stay, restaurant reservations, room gifts, off site activities, etc.) so they feel ownership.
5. Rules
 - Put them in writing
 - Confidentiality—explain, do NOT assume
6. Suggested assignments prior to retreat
 - Personality tests
 - Photos
 - Love letters
 - Memories
7. Plan Fun events half of the retreat time
8. Room gifts
9. Integration of in-laws
10. Ice breakers—The Ungame, Book of Questions
11. Topics
 - Personality profiles
 - Family History
 - Traditions/rituals
 - Life lines
 - Family Economic status
 - Family business
 - Family assets
 - Family properties
 - Family benefits
 - Family investment company
 - Safety nets
 - Estate planning
 - Trusts
 - Family partnerships
 - Taxation

L3 Family Retreat Thoughts

- Gifting
- Durable Power of Attorney
- Who gets what in personal property
- End planning- how do you want your life celebrated?
- Legacy
- Generosity
- Love letters
- Health
 - Alcohol
 - Addictions
 - Depression
- Networking
- Personal goals
- Personal plan
 - 1 year
 - 5 year
 - Action plans
- Bucket lists
- Updates- personal and business
- "What we do" a day in the life of
- Wishes and dreams
- Picture "show and tell". Its importance to you, the story associated with it
- Societal impacts on family's future
- What I wish I could have told myself at 18
- The philosophy
 - Of fishing
 - Of golf
 - Of cards
- The joy of play/Balance in life
- Outside resources present at retreat or made available to family members
 - Estate attorney
 - Tax attorney
 - Health specialists
 - Family counseling
 - Family member's expertise

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12. Off sites

- Cooking Class
- Ballooning
- Hiking
- Biking
- Boating
- Jeep rides
- Sport shooting
- Oktoberfest
- Skiing—snow and/or water
- Golf
- Horseback riding
- Spirit guides/Readings
- Fishing—ocean/lake/fly
- Photo Sessions
- Wine tasting
- Antiquing/thrift shops
- Spa treatments
- Charitable projects
- Concerts
- Theatre
- Comedy shows
- Outside resources
 - Tour guides
 - Naturalists
 - Trainers
 - Golf lessons
 - Fly fishing
 - Climbing
 - Shooting
 - Artists
 - Chefs