



the Experience

“We believe that legacy is more than money, social status, and material things. It’s about the depth of our contribution to the planet and humanity and how we cultivate connections with the people who matter most.”

EMPOWERING EMERGING FEMALE FAMILY LEADERS

Wellth Works’ signature one year coaching engagement is designed for **ambitious, intentional emerging female family leaders** who are ready to make an impact, aren’t satisfied with just a “seat at the table,” and want to develop their authentic voice within their family system.

They may be stepping into new challenging new roles (either in the family office or family business) or more simply need some support gaining clarity in their personal or professional life.



THE CHALLENGE

Family systems are complex and often have divergent, entrenched processes and interests. Family wealth adds an additional layer, and for an emerging female family leader, finding her unique identity, significance, and power as an asset recipient can feel daunting.

It's hard to untangle her "self" and her desires, from the parents', grandparents', and spouse's expectations. As a woman, in this inheritor role, she's often misunderstood, underestimated, overlooked, or simply ignored.



THE SOLUTION

The Wellth Works method transforms women in multigenerational wealth families from asset recipients to confident, compassionate leaders. Women receive access to a monthly and quarterly customized plan to flourish in their lives personally and professionally. Our year long coaching engagement uses our signature "Wellth" formula — Finances, Wellbeing, Significance, and Contribution — to deliver an innovative, experiential engagement that powers her ability to flourish in all aspects of life.

The Wellth Works formula creates tangible results in our signature 4C's: confidence, clarity, communication and connection. As a result she sees measurable shifts in the clarity of her life's path, the confidence to execute her unique plan, and the tools and resources to connect more deeply with her family and make a contribution to others. Women leave the one year engagement with:

- *A one year container of support for accountability and resilience*
- *A quarterly action plan that feels aligned at a soul level to produce results*
- *A clear vision that provides focus and inspiration for all parts of her life*
- *Tools and skills to achieve greater self-awareness and a deeper sense of purpose*
- *Communication skills to artfully navigate conflict within the family system*
- *A powerful community to support her success*

HOW IT WORKS



PHASE ONE

Curiosity and Connection

We know the best relationships are built over time and are rooted in trust. We use a variety of experiential inquiry and introspection tools to jump-start the growth process. We'll begin with a discovery session where the female family leader will get access to customized Wellth Works questionnaire that uncovers clarity on:

- where she is stuck,
- what she wants to change, and
- what's available to create.

This integral step allows us to get to know the “real her” that's ready to emerge.



PHASE TWO

Spa Day for Your Soul

A personalized, mini-retreat where we dive into her dreams, map out where she wants to go, and what needs to be shifted to get there.

- Together we co-create a detailed vision and action plan through a series of unique and proprietary experiences.
- From there we introduce the tools of the “Wellth formula” that will give her new access to clarity, connection, confidence and impact.

This will leave each woman with new ways of communicating and listening to find her authentic voice, and make an impact through her communication.



PHASE THREE

The Work: Competence to Embodiment

A One Year coaching container where the magic happens. She gets 18 dedicated 1:1 sessions with one or both of our certified trained coaches and leadership experts.

“Everyone has a purpose. We can not live our purpose until everyone has an opportunity to fully live theirs.”

•+ The Perks

- “Wellthy Wisdom” books, gifts and treats along the way to delight and inspire.
- Exclusive access to our mastermind network to build community and access peers that get “her.”
- Special Invitations to Wellth Works hosted events throughout the country.
- And finally, workshop activities and travel adventures that combine learning, play, and personal growth—why not have a blast while stepping into your new true self?



Why Wellth Works?

Wellth Works is a proven leader in elevating and activating confidence and impact for emerging female family leaders. Our founders are successful ambitious leaders from families of influence that bring their unique experience to our curriculum. The formula is easy to understand and relevant to any area of her life, and the action plan is comprehensive and built to facilitate immediate impact. Our clients leave the Wellth Works experience deeply transformed with results in areas of purpose, leadership, confidence, and productivity.

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