

CASE STUDY

How ASCEND helped this G3 Inheritor Uncover Individual Purpose and Embrace her Role as a Family Steward



WELLTH
WORKS

The Ascend Program

Inheriting wealth is a big responsibility.

Balancing the financial implications and family expectations is tricky enough, but growing up with legacy wealth while building an individual career, maintaining family ties, and navigating the messy middle of being in your mid-twenties during a global pandemic? **Talk about a tricky and complex journey.**

With the strategic guidance and mentorship of Ella and Michelle through the ASCEND Program, Meg was able to face this challenge head on and learn how to confidently lead in all areas of her life.

Prior to working with Wellth Works,

Meg struggled with balancing her identities: a working woman, itching to climb the corporate ladder; a rising generation heir, dutifully contributing her time and talent to the family office; an aspiring artist; a good friend; a good daughter; the list goes on and on.

But what did it mean to Meg to hold each of those identities? And how was she supposed to navigate this all on her own?

She started with family.

“My parents and their siblings were all founding members of the family council, so it was clear which roles they needed to fill. My generation was different. There wasn’t a clear path to engagement, so it was really up to us to come together and advocate for what we wanted our roles in the family office to look like.”

ASCEND AT A GLANCE

A year long educational and coaching engagement for wealth inheritors – because wealth that is stewarded from a place of wholeness and personal power goes beyond material things and social status.

Ascend will help you find your voice, define your path, and take the lead.

www.wellth-works.com/ascend



“The ASCEND Program showed me how much autonomy I actually have, and helped me develop the tools I needed to gain confidence and agency in all areas of my life.”



202-780-9107



info@wellth-works.com



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Ultimately

Meg and the other G3's landed on philanthropy as the focus of their contribution to the family office, but finding clarity in one aspect of identity just left more room for confusion in the others.

"I participated in other peer groups and organized programs, and while they opened the door to a community, I really struggled to find within them a space where I could explore this intersection of life and career and family dynamics without being pushed into a box."

That is, until she met Ella and Michelle.

"I knew immediately when I met Ella and Michelle that I wanted to work with them in some capacity. Ella and Michelle each had a unique story that I could connect with in my own way. I sensed they would be able to help me address these hurdles with an added level of understanding. I didn't even realize at first that they were business partners since I'd met them separately, but realizing I could work with them together was even better."



ASCEND was different from the other programs Meg had heard about or been involved in over the years. Instead of teaching a group of people about the way they are "supposed to" navigate their shared experiences, Ella and Michelle focus on the individual.

"Ella and Michelle have an amazing talent for **connecting and curating people**. In ASCEND I was able to work closely with both of them to reflect on what I truly wanted and envision the future that felt right for me, but they were also able to connect me with other amazing women who didn't just share my experiences but also my values and the struggles that I was having at this stage of my life. For the first time I felt like all of the boxes that make up who I am were opening instead of trying to stuff myself into a single box that represented all of it."





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Opening doors and meeting new people was just part of the transformation for Meg



“I learned how to recenter myself in my own narrative and embrace the fact that I get to decide who I want to be and how I want to show up in all areas of my life. I thought that by getting a new job or getting more involved with my family I would find more connection with those parts of myself, but it wasn’t until working through that self-reflection and taking ownership of my role in those areas of my life that I was actually able to find confidence in those roles and feel at home in my own identity.”

The themes of self-reflection and confidence really hit home for Meg. When asked about the lasting impact of ASCEND she explains...



“This program was the missing piece I didn’t know I needed in my toolbox. It was all the things I never gave myself time, space, or permission to dig into, and left me with meaningful relationships that I will have for the rest of my life. It pushed me to be a stronger, more independent, and healthier version of myself. I have a greater awareness of the role that I play in my own life and in my own happiness, and that is something that will stick with me forever and make me a greater asset to whatever I choose to dedicate my time and energy to.”



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