

## CASE STUDY

# From Black Sheep to Dark Horse



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*The Ascend Program*

### Before Ascend

After years of working to build her life and her personal business with as much distance as possible between her and her disparate family, Sarah found herself being pulled unwillingly into the family business when her mother was diagnosed with an unexpected and degenerative condition.

Having to navigate disempowering family dynamics, caretaking for her mother, taking over her mother's work managing a massive family foundation, all while keeping her own small business running, had Sarah feeling crushed under the pressure.

Determined to find her power in her family and keep her business afloat, she went through both the Ascend and the Rise programs. She's come out with even more than she asked for: an impenetrable sense of self-respect, a thriving business, and systems in place with her family that support her boundaries.

### ASCEND AT A GLANCE

A year long coaching program for wealth inheritors and future family leaders to gain clear life direction, financial responsibility, and effective leadership skills.

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

[www.wellth-works.com/ascend](http://www.wellth-works.com/ascend)

*With her coaches' help, she feels her standing within the hierarchy of the family is stronger. She has learned how to command the respect she deserves. Where she once expected her family to notice her growth and hard work and treat her accordingly, she now advocates for herself and does not wait to be recognized.*



202-780-9107



info@wellth-works.com



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## The Black Sheep

Growing up in a very conservative upper-middle-class family, Sarah's liberal values and talents as an artist always set her apart. Her family's wealth came in her final teenage years while living at home. It was always something that felt foreign to her, especially since her parents decided not to help/fund any of their children financially beyond paying for their education.

Her parents' decision not to get financially involved in her life gave Sarah freedom—it didn't matter to her what they approved or disapproved of, because there were no strings they could pull to control her. So when she decided to start a creative business in 2020, it didn't matter that her family disapproved.

And despite the pandemic, the business was doing well, and she was slowly paying down the \$20k personal loan she took out to get it started.

Then came the call from her parents.

Her mother had been diagnosed with “Alzheimer's ugly cousin”. She would need caretaking, and she needed someone to take over managing the multimillion dollar family foundation. As the only sibling without her own children, both jobs fell to Sarah.





## The Breaking Point

The pressure was immense. Not only was she having to figure all this out—running her own business AND a family foundation—with an art degree as her only training; she had to do it all perfectly.

On top of that, was the isolation. The physical isolation of the pandemic, and the emotional isolation of the fortune: she wasn't allowed to tell anyone about the family money, and she felt like she didn't have a right to her feelings. She knew the immense privilege she had. She'd somehow won the lottery, and yet she was miserable and crying every day.



And then there was the immense grief she was going through at what was happening with her mother.

She wrote “an aggressively vulnerable email” to her family accountant, asking for some sort of therapist or someone who specialized in this situation, because she had lost the ability to leave the house.





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## Turning It Around

She chose Wellth Works because her needs went beyond therapy. She needed tactful help to get through this chapter. To be emotionally supported, but, “I also needed to know how to DO this and organize my life so this HUGE thing fits into it, when I was already at max capacity.”

Finding Wellth Works was revelatory. To have someone hear her whole situation, including the shame she felt for being depressed about being roped into a fortune. They helped her understand how many people go through this, even when they have had years to prepare for it, instead of having it sprung on them like in Sarah’s situation.

*“They helped me speak my family’s language so I could negotiate for what I needed.”*

Sarah needed help both with keeping her business afloat and navigating the situation with her family, so Michelle and Ella combined both the ASCEND and RISE (a career building curriculum) programs for her.

Now, two years later, her business is doing better than it ever has. They helped her rework her time so she could be there for both her business and her mother. They helped her create a passive income stream for her business to allow for the days she needs to be there more for her mother or take time for her own mental health.



They helped her get the financial skills she needed to manage the foundation, taught her how to have business negotiations with her family, resulting in her being compensated for the work she is doing for the family business. With her new communication and financial literacy skills, she has begun to be taken seriously in family discussions.



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## The Power of the Dark Horse

With her coaches' help, she feels her standing within the hierarchy of the family is stronger. In learning effective leadership skills, she has learned how to command the respect she deserves. Where she once expected her family to notice her growth and hard work and treat her accordingly, she now advocates for herself and does not wait to be recognized.

She has proven to be an asset to the family. A sort of dark horse in the family: the one everyone expected so little of, but who was actually uniquely positioned to take on her mother's work managing the foundation. She is an asset to the family, and she no longer depends on external validation. She sees herself in the power of all her facets: as an individual, a member of an influential family, and as a business owner who has both the responsibility and the power to create a positive impact within the community– and she advocates from that place.

Meanwhile, her family is beginning to recognize the asset they have in her as a family leader, after all. She has truly ascended into the position of first mate in the organization.

Even with her successes, she is now working with Wellth Works to navigate her exit from this position in her family's business.

Sarah now has the power and perspective to leave both on her own terms and on a high note.



*“Having them there to help me get what I wanted and not let my values suffer and my health suffer has been huge.”*



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## THE DARK HORSE WINS

Before the program, Sarah couldn't see how to balance the purpose she feels in making her art and the passion she has for the environment with the conflicting priorities of her family and their business.

After working with Wellth Works, her life direction is more clear than ever before. She decided to leverage her artistic purpose and passion, channeling the knowledge that she built from managing her family's charity work and direct it towards a foundation she believes in by supporting it with her art. Now that foundation has invited her into a leadership position, and a whole new path that aligns her passion and her purpose with the possibility of massive impact is opening up for her.

Through this whole process, Sarah has not only learned that she has a right to advocate for what she wants, she has begun to embody that truth and move in the power to create her life on her terms, no matter what life throws in front of her. She could not be happier that she made the commitment to the process with Wellth Works and would recommend it to anyone in a similar situation—which she now understands to her surprise, is not all that uncommon.

