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# Collier Conversations

Insights from Charles W. Collier

Harvard's Senior Philanthropic Adviser and Author of *Wealth in Families*

MARTHA STEWART



Charles W. Collier MTS '73

"You are fortunate because the most difficult challenges you face are not financial, but, instead, they are relationship-based and family-based. Money can be a source of anxiety that can affect your family relationships. After thirty-five years of working with individuals and families of wealth, I have discovered that the hardest yet most rewarding conversations in your family can help you make better decisions. My interest is in a broader perspective and your family challenges. I serve as a resource as you engage in breakthrough conversations to expand your understanding of your family and enhance each member's growth."

CHARLES W. COLLIER

## Here is a sample of the questions that other families have wanted to address:

- How much information should we give our children about our wealth and estate plans?
  - What are appropriate inheritances for our children, and when should we tell them? How much money should we give—outright or in trust? Should we give them a say in their inheritances?
  - My children already have trusts. What are the qualities that I should be looking for in a trustee?
  - Should we let our children make their own decisions around a prenuptial arrangement?
  - How should I share some of my wealth with my second spouse and her/his children?
  - How should we integrate in-laws into our family?
  - How should I accept the differences within my family?
  - How should we live a life that's consistent with how we want to raise our children?
- How should we raise children in the context of wealth?
    - What can we do for our children to help them find a binding passion and turn it into meaningful work?
    - How do we raise children who will be resilient throughout life's transitions, challenges, and losses?
    - What will my children think if they don't have to work?
    - Can I encourage my children to lead their own lives while staying connected to the family?
  - What principles should guide us in our philanthropic work? Should we invite our children and their spouses to be on the board of our family foundation?
  - "Shirtsleeves-to-shirtsleeves" in three generations: What can I do to prevent that outcome?
  - What does my family need in the future to maintain its strength?
  - What should I think about my legacy?

"Our conversations with Charlie over the years have led to an estate plan that Linda and I are very comfortable with. He helped reconcile our differing ideas through patience and trust. In the end, our children and their children will all be better off for Charlie's guidance."

WILLIAM P. COLLATOS AB '76, Boston, Massachusetts

"Charlie has been a loyal friend and wise counselor on the philanthropy of our family. He always is inclined to listen first and speak after, quietly and thoughtfully."

M. E. ZUKERMAN AB '66, MBA '70, New York, New York

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