

Talking about What Matters



I help families talk constructively about money, inheritance and their desired legacy.

While traditional estate planning is largely successful in transferring financial wealth to succeeding generations, it does little, if anything, to prepare the inheritors. The primary source of inheritance-related problems lies in poor communication and unprepared heirs. “Shirt sleeves to shirt sleeves in three generations”: research shows that over half of all inheritances are consumed by the end of the second generation, and family unity is often fractured. A staggering ninety percent of inheritances are consumed by the end of the third generation. The risk of financial and relational dissolution increases with each succeeding generation. Successful multi-generational families include Legacy Planning in addition to their estate planning. Through facilitated communication, Legacy Planning identifies and provides solutions to the non-financial issues that are most problematic in successful wealth transition.

My forty-plus years of working as a financial services professional have convinced me that the money is the easy part of wealth transfer. It’s preparing the inheritors for the responsibilities and opportunities of managing their assets that is the most challenging.

I measure my success one family at a time for generations to come.

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