11 Great FuturePath Reads for the Next Generation From 2021

PATHSTONE
THE MODERN FAMILY OFFICE™

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Creating generational wealth brings the opportunity to define a family's legacy. The creation of that wealth is merely the beginning of the story, and thinking about the chapters to come requires both an understanding of the challenges and responsibilities of being a steward of wealth. Pathstone is committed to helping our clients create that legacy through education and communication so that the wealth managed today is wealth that lasts generations.

Pathstone created FuturePath to facilitate the communication and implementation of wealth stewardship. In 2021 Pathstone hosted several online events and forums and published articles, all of which speak to financial education and advice on creating generations of financial stewards.

In case you missed it, here are 11 great reads from 2021, brought to you by FuturePath.

Planning for the Future

1. Looking to the Future, Our New Year's Resolutions

FuturePath intends to be here for the next generation. Our 2021 New Year's resolutions were to be educators, to be coaches, and to be facilitators. Read about the intentions we set for the year.

2. Estate Planning 101: 2 Parts series to help you best approach estate planning for your family.

Part 1 | Estate Planning 101: 7 Documents to Consider
Learn the basics of estate planning and identify the 7 types of documents that may comprise your basic estate plan.

Part 2 | Your Guide to Key Decisions and Pitfalls
Understand the 4 key decisions and pitfalls to set yourself up for success and meet your estate planning goals.

Special Financial Topics

3. ESG Investing | Top 3 Interesting Questions Millennial Investors are Asking
As millennial investors inherit wealth and move into leadership positions, we answer questions to help them achieve their investment goals.

4. Important Lessons on Entrepreneurship from Successful Coffee Industry Entrepreneur and Author Joshua Dick
We hosted an engaging dialogue on entrepreneurship with author Joshua Dick as he explained how his simple "Grow Like a Lobster" mantra helped grow his grandfather's small coffee business into a global business spanning 70 countries and growing sales 25 times in 15 years. **Read the 10 key lessons on entrepreneurship and watch the webinar replay.**

5. 4 Important Drivers to Consider for Your Financial Health
Spending, borrowing, saving, and planning are 4 main drivers of your financial health. Determine if your plan aligns with your future goals.

6. Buying a Home: 3 Important Pillars to Planning Your Purchase
Whether buying your first house or upgrading to a forever home, it's a big investment decision that affects your other financial goals. **Read the 5 key takeaways and watch the webinar replay.**

7. **5 Important Charitable Gifting Strategies to Achieve Your Year-End Goals**
Read the step-by-step guide on how to approach charitable gifting strategies for year end.

Fostering Financial Readiness for the Younger Generation

8. **Children Financial Planning: 2 Practical Savings Opportunities for Your Growing Family**
Sorting through the universe of financial planning options for your children's future can be daunting. Use these tips to get you started.

9. **How to Raise Your Children to Embrace the Family Legacy**
Imparting tools, wisdom, and values to future generations while not constraining their ideas is a challenge many face. Learn tools to help you on your journey of continuing your family legacy.

10. **The Many Paths to Discuss Education and How to Find Them**
The path to discuss education with your children can be intimating if undergone without a plan. Learn 3 ways to breakdown the discussion.

11. **The Impact of Reading to Your Kids**
5 children's books focusing on resilience and persistence, traits found in entrepreneurs, recommended to parents looking to discuss entrepreneurship with their children.

This year's work emphasized creating and fostering family legacy through a variety of ways. Pathstone is committed to Embracing and fostering solid financial stewardship that will secure the future path for our clients and their families shaping their family legacy one day, one year, one generation at a time.

We are here to help, reach out to us if you have questions.

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