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From the Desk of Bill Coppel

For the first time in history, there are five full generations in the workplace - from the Silent Generation to Gen Z. As a Boomer, I've been reflecting on this phenomenon and how age-related stereotypes and outlooks can affect how we relate to one another in business.

What's interesting is that the same dynamics are at play in families. I'm sure we've all witnessed tensions arise as the senior members of a high-net-worth family strive to ensure that wealth gets transitioned according to the values and beliefs of the generation that built it.

Whether we're working with clients as individuals, as a family, or as part of a family-owned business we're uniquely positioned to help them identify and articulate

their values - in short, what matters most to them in life. Read on for insights that can help you do just that.

Be Well,
Bill

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THINGS WE LIKE

Discovering What Matters Most

When we are at our best, applying our energies to what matters to us, the natural result is greater fulfillment. It takes intention and focus to align our time and energy with our personal values. Even when we seek change, it doesn't come easily to us; people need help getting there. And that begins with an exploration of their unique Network Profile or how we connect to one another. [Read the Full Article >](#)

Aligning Investments with Values

Wells Fargo Investment Institute explores the many facets of sustainable investing. The report also outlines challenges and trends for sustainable investors in the years ahead. [Read the Full Report >](#)



THE NEXT FRONTIER PODCAST



The Silent Disruptor - Generations in the Workplace

Today, we have five generations participating simultaneously in the workforce and with that comes conflicting beliefs and values; technology playing an important factor. [Listen to the Podcast >](#)



Mark Widmer: Delivering Transformational Experiences to Help Families and Businesses Thrive

Many families and businesses don't realize that building a legacy is about more than the transfer of wealth. In this episode, Mark Widmer, licensed recreational therapist and professor at Brigham Young University's Marriott School of Business, joins us to discuss how to build a culture that aligns with your values to help ensure a legacy for generations to come.

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Dr. Dennis Jaffe: The Impact of Family Dynamics on Generational Wealth

A legacy of wealth anchored in healthy family dynamics can span generations, yet the dialogues around this topic are often taboo. As advisors, how do we help clients navigate these dynamics? Dr. Dennis Jaffe, author, professor, and research associate at

Wise Counsel Research, joins us to discuss ways advisors can help families set generational goals.

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WEBCAST



How to Speak so that People Want to Listen

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