



HAMMER  
& ASSOCIATES

Engaged  
Philanthropy™  
Volume 3

Making the Most of Family Dynamics:  
A Family Office Guide to  
Meaningful Giving

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## About This Guide

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Welcome to *Making the Most of Family Dynamics: A Family Office Guide to Meaningful Giving*, the third in a series of EngagedPhilanthropy™ guides—offering tools to help family offices worldwide plan and practice philanthropy that is both meaningful and measurable. Download the first two EngagedPhilanthropy guides *Laying the Groundwork* and *Balancing Passion and Strategy* at [SuzanneHammer.com](http://SuzanneHammer.com).

This guide is primarily for family office leaders (e.g., family heads, family office executives, committee members, other family members) who wish to take a more intentional planned approach to philanthropic giving. It is applicable for both U.S. and international family philanthropies.

While there is no “one” way to “do” philanthropy well—or family dynamics for that matter—there are learned practices, tools, and ideas others have tried and found helpful. We offer these ideas for you to read, reflect, and take back to your family or the families you serve. We hope they lead to enlightening and productive discussions.

## Family Dynamics in Family Offices

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In my work as a philanthropy advisor at Hammer & Associates, I meet with a lot of families who share stories about what it's like to give as a family, with parents, grandparents, cousins, aunts, uncles, and/or siblings. They tell me that giving together brings a depth to their relationships that they never had before. As they make decisions together, they get to know and respect each other in new ways. They better understand each other's passions, interests, and working styles. They build something bigger than they could have on their own, and that it creates an educational opportunity, a training ground, where they can bring the next generation into the family fold.



In spite of these rewards, giving with family has its challenges. Even in the most successful families, misunderstandings, disagreements, and power struggles can and do occur. Whenever a family must make decisions together about money—whether it's making money, keeping money, or giving it away—it can get tricky. Emotions run high and family members may react or revert back to long-established roles and patterns of behavior.

I experienced this first-hand in my own family when my dad passed away in 2015. Losing a parent is hard enough, but I wasn't quite prepared for how it intensified the family dynamics between my siblings and me. I am part of a blended family with two older brothers and two younger stepsisters, and my father was the only parent we had left. With him gone, it shifted the power and roles and responsibilities among us. It brought to the surface family dynamics (good, bad and ugly) and temporarily caused more rifts than connectedness. I share this story to acknowledge that dynamics are something that *all* families face, particularly families of wealth. Yet there are helpful ways to manage these dynamics for the good of each person and the good of the family.

## Where Do Family Dynamics Come From?

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### 1

All families operate in ways that are influenced by family dynamics. Although a family itself is a larger system, it comprises individual members who have their own interests, goals and preferences. These individuals are born into certain roles in the family and may consciously or unconsciously play out certain scripts as a result of their role—be it patriarch, matriarch, son, daughter, sibling, cousin, niece, or nephew. Family dynamics reflect the way family members interact with each other, based on their roles, as well as their personality or their individual style.

Family dynamics exist in families, all day, everyday, 365 days a year. Some of these dynamics can be helpful in deepening our understanding and our own growth. Other dynamics can be hurtful, and if not handled correctly, can hinder good decisionmaking, wreck relationships, and in some sad cases, cause families to fall apart.

### Good Communication Can Prevent Family Upset

"We work with many generous and philanthropic families, and a common misstep we see is when family members assume others will take the same approach as they do. When that doesn't occur, communication breaks down, families may divide or become distant, and many amazing results that could grow out of their collaboration might be forever lost. When we see this scenario, we encourage each person to try to see the other person's point of view. It can be eye-opening.

There was one family in which the father gave each of his three children an annual gift tax exclusion of \$14K. One year, he delayed making the gift. When his daughter asked him where the money was, her father was insulted: How dare she expect it? It was a gift. We encouraged him to look at it from his daughter's perspective, and how she had come to rely on that money as part of her annual income. In this case, money wasn't the root of the issue—it was the lack of clear communication. Going forward, he made a point to share the plan with his kids, and it has made a big difference for the family."

– Lindsay Garland, Vice President and Client Advisor,  
Glassman Wealth Services

## Where Do Family Dynamics Come From?

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The good news is, in most families, the rewards of working together and giving together far outweigh the challenges. This guide will help you acknowledge and skillfully navigate family dynamics in the families you work with—to the extent of your abilities.

### **This toolkit answers the questions:**

- What are family dynamics, and how do dynamics commonly show up in families working together?
- How can family offices help their families navigate these complex and confidential dynamics in ways that support the best interests of the family and its philanthropy?
- How can effective philanthropy help families strengthen relationships?

**Words of Caution:** This toolkit is for informational purposes and in no way implies that family office staff should involve themselves in family dynamics beyond their training or skill level. There is potential to do more harm than good, and it's taking a big risk for you as staff and for the family. There are plenty of professionals who are skilled in working with family systems and dynamics. Please seek out the appropriate help and resources that your families need.

*“The biggest challenge that all of us who work with families face is when we leave our area of knowledge and enter into a place that can get us into big trouble. Family office staff and advisors need to be careful.”*

*– Laurent Roux,  
Founder and CEO,  
Gallatin Wealth Management*

## Top 10 Most Common Family Dynamics in Philanthropic Families— And What Family Offices Can Do About Them

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### 2

It's not a matter of IF family dynamics occur in families of wealth; it's a matter of WHEN. It helps to be prepared. Here are 10 of the more common family dynamics that arise in philanthropic families, along with family office tips for managing them. These dynamics typically occur 1) when a family is getting started in philanthropy, 2) out of conflicts within the family, or 3) when a family is facing succession or planning for change.

#### **1. A family matriarch and/or patriarch starts a philanthropic foundation or fund with the hope (i.e., expectation) that the adult children will carry on the work.**

If the parents haven't involved their children early on in the family enterprise or philanthropy, the adult children may respond to the "opportunity" with delight, dread, or something in between. The children may feel that philanthropy is their "parents' thing" or feel pigeonholed by the funding focus set by the parents.

**What can family offices do?** As many successful family offices know, philanthropy is a training ground to teach adult children how to manage wealth. Encourage parents and grandparents to talk with kids early about the family enterprise and philanthropy, especially as those kids enter young adulthood. Find out about what their interests are, ask them if and how they would like to get involved with philanthropy, and set up a structure in which they can research and give away small amounts to causes they care about.

## Top 10 Most Common Family Dynamics in Philanthropic Families

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**Questions for families to consider:**

1. What is the true motive for setting up the family philanthropy?

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2. How can we involve children early, teaching them the family values and about volunteering and giving for social good?

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3. If (and when) the younger generation has different interests than the older generation, how will the family handle these competing interests and find common ground?

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## Top 10 Most Common Family Dynamics in Philanthropic Families

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### 2. Families grow and disperse to different geographic locations, and it's hard to keep the family together.

Especially as a family approaches the third and fourth generation, families can grow into a lot of people. This requires more structure and organization to keep the family philanthropy together, if that's in fact what the family wants to do. As different family branches or individuals move to different locations, members may no longer feel connected or interested in giving to the geographic area of focus.

**What can family offices do?** If geography is an issue, discuss ways the younger generation can honor their parents' wishes to fund in a certain location, and yet still connect with and feel rewarded in the work. What about when there is no longer family living in the geographical area? Some families engage outside administrative services or hire a first staff person who lives in the community where funding was originally intended. Others decide to use discretionary grants to meet various community needs and family interests, or ultimately divide into separate philanthropic funds.



## Top 10 Most Common Family Dynamics in Philanthropic Families

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**Questions for families to consider:**

1. What are some ways to bridge the distance between family members across the miles?

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2. How important is family unity relative to the funding focus, donor intent, and community needs?

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3. If giving to a certain geographic area is a priority, how can the family maintain the interest of members who no longer live there?

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## Top 10 Most Common Family Dynamics in Philanthropic Families

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### 3. Family members have different interests and ideas for how and where they want to give.



One of the more common tensions a family will face is how or where to give. When you bring together any group of individuals, there will be different interests and passions in the room. Each person cares about something different—poverty, the environment, hunger, the arts, horses, you name it. If there isn't agreement for how to vet potential organizations and respectfully discuss the pros and cons of each, tensions and misunderstandings may fly.

**What can family offices do?** As family office staff, you can help the family set up a structure they can use for discussing potential causes and organizations. This will keep the family focused on the content of those potential grantees versus heading into the discussion jockeying for position. This

may mean a longer conversation in the beginning, as everyone brings to the table more possibilities. Ultimately the family will move toward fewer organizations, more in alignment with areas they are significantly interested in.

## Top 10 Most Common Family Dynamics in Philanthropic Families

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### Questions for families to consider:

1. How can family members with different interests align on a common focus?

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2. What framework can the family use for discussing potential causes and organizations?

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### Aligning Interests

One family office created a framework to align interests, whereby family members could share in advance a prospect organization's website, its location, the size and financials of the organization, its fit with the family philanthropy mission, why the family might be interested in funding it, and how much they wanted to give. With help from family office staff facilitating the discussion, the family was able to prioritize among these organizations those they would focus on now, those they would focus on later, and those that would be better recipients of individual giving (versus giving as a family).

## Top 10 Most Common Family Dynamics in Philanthropic Families

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### 4. Family roles and generational differences hinder family members from seeing and treating each other as individuals.



Parents may always think of their adult children as “children,” and maintain that position of authority well into their elder years. Children may feel their parents are living in a different world and will never understand them, or that they don’t have a voice. Siblings can rival from an early age, and are especially sensitive to unequal treatment, real or perceived. Many times, the roles family members play and the rivalry acted out can continue into adulthood—and in some cases, may create long-standing rifts between entire family branches.

**What can family offices do?** While there may not be much you can do as staff to change deeply imbedded dynamics (nor would you want to involve yourself in that way), you can help the family discover and understand what is important to each person, and how and why they communicate the way they do. Create a space where everyone has a voice, and encourage each person to see things from the other person’s perspective. If the family is open to it, bring in an outside professional who specializes in family systems.

## Top 10 Most Common Family Dynamics in Philanthropic Families

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**Questions for families to consider:**

1. Does everyone have an equal voice? If not, how does that affect the philanthropy or work at hand?

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2. How can we encourage family members to see and understand others' perspectives?

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3. What additional professional support do family members need to overcome obstacles and strengthen the family system?

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## Top 10 Most Common Family Dynamics in Philanthropic Families

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### 5. Family members have different beliefs, communication or individual styles, which hinders their ability to work well together.



Families can make each other crazy with stylistic and ideological differences. Imagine a boardroom full of family members who fall across the political or religious spectrum. One adult sibling who won't stop talking, and another sibling who can hardly get a word in. A millennial who will only respond to text messages and takes notes on a laptop. A traditionalist who has no time or patience to learn technology. Sound like a fun meeting?

**What can family offices do?** Again, it helps to create a common framework for communicating that can help philanthropic families focus on the good they are there to do. Practice good governance, articulate family values, set ground rules for meetings, and remind family members why they are there in the first place. Help the family create agreements for how the family will communicate about the philanthropy outside the meetings as well.

## Top 10 Most Common Family Dynamics in Philanthropic Families

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### Questions for families to consider:

1. What do we value in common as a family? How does the family interact and respect each other, regardless of differences?

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2. What communication framework can we use in meetings to stay focused on what matters—the philanthropy the family is there to do together?

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*"When families spend time creating a structure to how information will be shared and discussed, it helps overcome any stylistic differences in the room. I've seen how creating a common framework changed a family's experience in working together. Attitudes shifted from dread and overwhelm to excitement and hopefulness. Once they got their stylistic differences out of the way, they became excited about the work itself of actually funding these organizations."*

*– Patricia Armstrong, Senior Director, Abbot Downing*



## Top 10 Most Common Family Dynamics in Philanthropic Families

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### **6. Family members are in active conflict with one another, and they bring their personal beefs into the boardroom.**

Conflict is a natural part of all human relationships, and as a family grows and more people become involved in the philanthropy, the level of tension and competing interests can mount. Family members from different branches may have little in common, or carry personal problems or resentments that get in the way of the work.

**What can family offices do?** Start with what everyone has in common—which is the desire to give—and add some structure to it. Determine what is normal, healthy disagreement, and what is simply inappropriate. If the undercurrent of conflict overruns the philanthropy discussions, hire an outside facilitator who is skilled in family dynamics. Make sure every family member has an equal voice. Create agreements for how the family will navigate conflicts as they arise. Hire a skilled facilitator to help.

#### **Questions for families to consider:**

1. When conflict erupts in family meetings, what are the core issues that need to be addressed?

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2. What tools can the family use to circumvent or manage conflict?

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## Top 10 Most Common Family Dynamics in Philanthropic Families

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### **7. Family members draw nonfamily members or staff into side conversations, gossip, and other unproductive family dynamics.**

Side conversations and gossiping can happen in any group situation, and families are certainly no exception. In some cases, having a family office executive or staff in the room can keep family members on their best behavior. However, that's not always the case. If not careful, family staff can get sucked unaware into the undertow of family woes.

**What can family offices do?** Expect family conflict to come up. Know that it's not your job to fix it (nor can you fix it if you tried), however you can help the family find the right resources to navigate it. Keep in mind: everyone will have his or her own story and perspective. Look for the core issues and focus there. Maintain a neutral, objective position where everyone feels heard, there is no right or wrong, and everyone saves face.

#### **Questions for families to consider:**

1. How does the family interact, in and out of the boardroom?

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2. What framework or tools could you put in place to promote more transparent communication?

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## Top 10 Most Common Family Dynamics in Philanthropic Families

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### 8. Troubled family members create friction among the rest of the family.

Debate and disagreement among family can be a healthy way to learn from each other and improve communication. What's not healthy is repeated debate and disagreement caused by a troubled family member. This individual may have personal issues that affect the way he or she relates with the rest of the family—such as wealth-related issues, personality challenges, mental health disorders, addiction, and more. Examples of troubled behavior include: spreading misinformation, repeatedly disrupting or manipulating conversation, verbally attacking or giving the silent treatment, and thwarting the family's otherwise normal discussions.

**What can family offices do?** Family offices should be prepared to address the problems caused by a troublesome family member and create preventative measures. Be sure to have good governance set up including ground rules for meetings, the family's expectations for all members, and policies on term limits and removal from family discussions when needed. Keep in mind: Dealing with a troubled family member is not something to go alone. This can be dangerous territory and you don't want to get caught in the middle. Hire an outside professional skilled in family dynamics who can help.

*“If you're smart—and you last a long time in family office—you quickly learn not to put yourself in the middle of family members. It's similar to when you have two friends who are dating and they have a fight: when they get back together, you are no longer the friend. If you're in the middle, you're going to get burned.”*

*– Wendy Craft, COO,  
Favara, LLC*

## Top 10 Most Common Family Dynamics in Philanthropic Families

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### Questions for families to consider:

1. How has the family changed its behavior or its ability to be productive to accommodate a troubled individual?

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2. What governance measures can the family take to prevent troubled family members from interfering or undermining the family and its philanthropy?

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3. What resources or outside professionals will the family call on for help, and when?

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## Top 10 Most Common Family Dynamics in Philanthropic Families

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### 9. Founders of the family philanthropy have a hard time planning for succession or passing control to the next generation.

In family enterprises, one of the biggest concerns people have is how to pass on leadership to the next generation. In spite of the concern, some families choose to delay or avoid preparing the next generation for their future roles. Without a plan in place, a family may make decisions arbitrarily, causing tension, resentment, or frustration among family members. For family leaders, passing on the charge to another often younger family member is about more than managing and giving away money; it's about sustaining the values, principles, and vision of the founder and family. Older family members may have a hard time letting go of authority (often called founders' syndrome)—leading other family members to feel they don't have a voice.

**What can family offices do?** No one sets out to harm the family or the philanthropy, and often, founders who “won't let go” don't realize the negative effects of their behavior. Be sure to have a good governance plan in place that addresses succession early and often, and provides a solid transition plan in the event of an unexpected change. Hire an outside expert who is skilled at family succession, and who can coach the founder and the successors on the change.

*“We have one client who considers it very important how she wants her assets to pass. She wants to control those assets from the grave, and the more she pushes, the more her children decide they don't want that.”*

*– Lindsay Garland,  
Vice President and Client Advisor,  
Glassman Wealth Services*

## Top 10 Most Common Family Dynamics in Philanthropic Families

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**Questions for families to consider:**

1. Does the family have a sufficient pool of interested family members who can continue the family philanthropy over time?

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2. Does the family have a plan for educating the next generation of leaders?

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3. What are the costs (financial and personal) associated with not having a succession plan in place?

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## Top 10 Most Common Family Dynamics in Philanthropic Families

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### 10. Family members are in denial (or refuse to talk) about their own death or the pending death of their loved ones.

Some family leaders aren't willing to let go, and are bent on maintaining control—even from the grave. They worked hard to build what they have, and want their wishes to be known and followed. They perhaps are in denial of their own mortality, and want to ensure that their legacy lives on.

**What can family offices do?** Until an individual or family member is ready to accept the reality of death or talk about it openly, there's not much a family office staff person can (or should) do to convince them otherwise. What you can do is ask them questions, give them space to talk about it (if they choose), and present different scenarios and what those scenarios will result in (e.g., the tax or leadership implications).

If you have a reluctant family leader who doesn't want to talk about death, you might frame it in terms of succession, asking: how do you want the next chair to be leading this? This can give the founder the feeling of control in spite of the sensitive topic.

### Stories Matter

It's helpful to capture stories of the matriarch and patriarch and their vision for what they would like to happen in the family and with the philanthropy long term. Ask them about their lessons learned, and what legacy they would like to leave. In philanthropy, this is called a letter of donor intent, and can also take the form of an audio or video recording.

“We had to rely on word of mouth, informal discussions and family retreats to share our grandparents' interests and intentions around giving. It would have been so much easier on the next generation if we had a donor intent letter, an oral history, or something more tangible to guide us—so that we could make sure to honor their wishes.”

– Family Member

## Top 10 Most Common Family Dynamics in Philanthropic Families

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**Questions for families to consider:**

1. What has the family done to prepare for the death of a donor or family leader?  
How can the family do a better job at preparing for this transition?

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2. What questions can family members ask the family leader to share about his or her wishes for the family enterprise and the family philanthropy?

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*“I worked with one family who had a tax issue with the way a piece of property was titled. The family patriarch was in his 90s, and I brought up the subject by explaining that when he passed, they would face excessive taxes if we didn’t change the title. They were so mad at me; they couldn’t face his pending death, and I missed that dynamic entirely. I had been looking at it through the lens of a tax issue—not a family one. Family dynamics are sometimes way more important than money.”*

– Wendy Craft, COO, Favara, LLC



## Steps for Resolving Conflicts

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### 3

When it comes to family dynamics, Laurent Roux, Founder and CEO of Gallatin Wealth Management, looks for hidden minefields. “This could be anything from secrets that aren’t told but everybody knows, conflicts of interest, a patriarch promoting dependency, a gatekeeper, or preventing the rising generation from getting involved,” he said.

Roux uses a family systems assessment to learn from each individual and how he or she fits into the system. “We can’t get to the process piece to help families learn and buy into their own solution until we figure out who the client is, and what kind of family system they are operating within. Are we looking at a family member issue, or the whole family itself? What’s the meaning of wealth within the family? And how can we get them to talk with us as advisors? These are some of the questions we ask when working with families.”

### Sometimes Splitting Is the Best Option

“My husband and I started out having one foundation, and it brought out the worst in both of us. He wants to know precisely how his charitable money is being used and what has been accomplished, whereas I invest in the long-term future, knowing that social change is difficult and takes time. I would rather support small and nimble organizations with staff members committed to the work, rather than reinventing the wheel. My husband is interested in meeting with entrepreneurs who are doing things new and different. Although we share the same values and goals, we have different approaches and different styles. Eventually we split it into two foundations—his and hers. That’s how we solved it.

– Cynda Collins Arsenault, Co-founder,  
Secure World Foundation

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Once he is able to identify the core issues, only then does Roux help guide the family toward resolution. The family has to come up with their own solution in order to have buy-in. He offered these four steps toward conflict resolution:

- 1. Separate the people from the problem.**
- 2. Focus on each person's interests and priorities, as opposed to their positions.**
- 3. Try to find several options for how to bring people together and in agreement on something.**
- 4. Bring objectivity to the process to help the family solve their own problem.**

While these steps can be applied to many situations, he cautions family office staff and advisors before treading into areas they aren't trained in or prepared for. "The biggest challenge that all of us who work with families face is when we serve a family beyond our own area of expertise or comfort. This can get us into trouble. Advisors need to be careful, and seek outside support and resources when needed."

"Advisors need to be careful, and seek outside support and resources when needed."

## How Can Family Philanthropy Strengthen Family Relationships?

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In addition to it being an opportunity to teach the next generation about wealth and responsibilities, philanthropy can be a great way to bring the family together and pursue impact in the world. Philanthropic families work together on something that matters, and doing so can help heal relationships that might have been hurt from unrelated situations.

For starters, philanthropy gets people together, and hopefully in the same room. “Some family members or branches don’t get to see each other that often, and a foundation or philanthropy meeting brings people together on a regular basis—allowing them to get to know each other better and in new ways,” said Lindsay Garland, Vice President and Family Advisor at Glassman Wealth Services.

Secondly, it creates a shared mission—something the entire family can stand for. According to Steffi Claiden, Publisher of UltraInvestor: “When a family gets together, especially multiple generations, it helps to have something they can rally around—one flag they can carry that says ‘we stand for this.’ Having that shared mission transcends everyone’s ‘stuff’ and generational differences. It’s something that everyone agrees on, and everyone wants to carry forward together.”

*“Philanthropy is definitely an opportunity for personal growth—some of which you might not want to look at. The most important thing is finding and following your passion. It’s not about the money; it’s what you and your family can do with it.”*

*– Cynda Collins Arsenault,  
Co-founder,  
Secure World Foundation*



Some people set up foundations to bind the family together, and that doesn't always work. In fact, many advise against setting up philanthropy with that sole purpose.

Lindsay Garland said this: "Family philanthropy—like any decision families must make together around money—can bring out people's personalities, for better and for worse." Families need guidance, and philanthropy requires the same level of attention, structure, and outward-facing focus that any family business does. "The family philanthropies I've seen work best have a facilitator to bring people together and work

through issues. Bringing in an outside facilitator—one who is skilled at blending family, money, impact, dedication, passion, love, and trust—can help a family have an amazing impact," said Garland.

*"Every family has dynamics, regardless of how much money they own. Money turns up the volume on the dynamics. Money can be a great unifier, inspiring people to come together around a mission, legacy, the values they want to pass down, the social good they want to make. Yet families can't navigate the dynamics stuff on their own. It takes outside help of a neutral, third-party professional. That's what I see successful families doing."*

*– Steffi Claiden,  
Publisher, UltraInvestor*

## In Sum: 8 Tips to Ease Family Dynamics

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### Here are some tips advisors shared for how they skillfully handle family dynamics in meetings:

1. Set clear ground rules and agreements how people will treat one another in family meetings.
2. Focus on what people do agree on versus forcing the conflict.
3. Make sure everyone has an equal opportunity to share his or her view.
4. Frame the discussion by reminding there is no right or wrong, everyone has an important perspective, and listening is vital: "We're here to understand each person's point of view; you don't need to agree with everything that is said here."
5. Diffuse discord by referring to the ground rules throughout the meeting: "How are we doing with our ground rules? What might we do better in this moment?"
6. If the discussion isn't going in a productive direction, you can say: "It sounds like there are differences we may not resolve in this meeting. What can we settle on here? What do you all need to think about and bring to another meeting?"

*"Managing any conflict goes back to governance. When a family sets up good governance and a mission statement and other similar tools, these tools become the roadmap for dealing with conflict. Most families, unless they are third generation down, don't have any governance in place—and that's when family dynamics can become a problem."*

*– Wendy Craft, COO,  
Favara, LLC*

## In Sum: 8 Tips to Ease Family Dynamics

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7. Always give people a graceful exit and the ability to save face; for example, suggest people take a break when needed, and remind people that they don't have to decide anything today.
8. Know that it's not your job to work through the conflict (you wouldn't want that job if it were given to you!); it's up to the family members themselves to do that, and some conflicts take years to resolve (or never do).

*Thanks to Patricia Armstrong, Senior Director at Abbot Downing, for sharing these suggestions.*

*"In a family office, you can facilitate simple structures to keep communication clear and focused as opposed to overwhelming. Spend some time up front creating a structure for how information will be shared and discussed among the family members."*

*– Patricia Armstrong,  
Senior Director, Abbot Downing*



## Resources to Learn More

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Bowen Center for the Study of the Family—thebowencenter.org

Chambers, Diana. *True Wealth: Letters on Money, Life, and Love*. Altitude Press, 2016

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Fleming, Quentin. *Keep the Family Baggage Out of the Family Business*. Fireside, 2000

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*Giving families tools to engage in and connect to their philanthropy.*

## About Hammer & Associates

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Whether you are an individual or philanthropic family, or a family office or wealth professional who serves philanthropic clients, you want to make real change for the causes you or your clients care about.



At Hammer & Associates, we give philanthropic families the tools they need to engage in and connect with their giving. We form deep, long-term relationships with private foundations, family offices, and the advisors who serve them, helping philanthropic individuals and families pair their passion with proven strategies.

We help you and your family office:

- Realize your family's philanthropic potential
- Strategize goals and manage your giving
- Tend to the day-to-day administrative duties of giving, so you and your staff don't have to
- Train the next generation to manage and preserve wealth
- Strengthen family relationships and communication
- Manage transition points, including succession, change in assets, and spend down
- For family office professionals: help the families set and achieve goals

**Download the first two EngagedPhilanthropy guides [Laying the Groundwork and Balancing Passion and Strategy](#) at [SuzanneHammer.com](#).** To learn more, contact 303-319-3029 or [Suzanne@SuzanneHammer.com](mailto:Suzanne@SuzanneHammer.com). Follow [@philanthrpsolut](#).

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