
What do we need to be thinking about, when guiding clients through intergenerational succession & transition events

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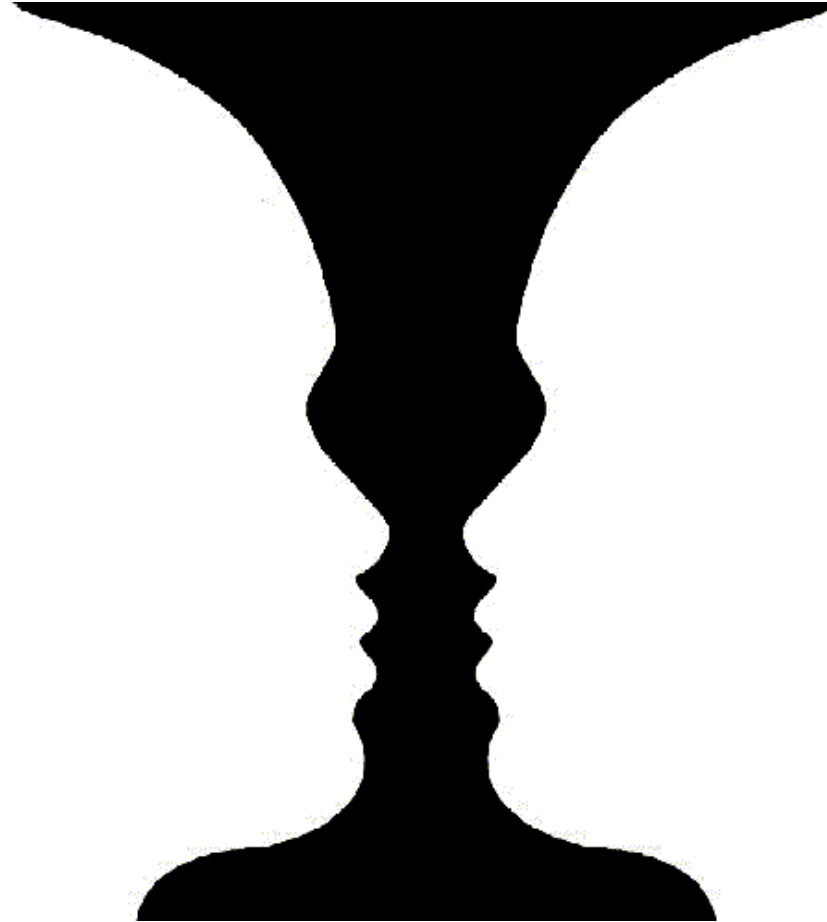


Working
Minds...



Working
Minds...

What is a good outcome?

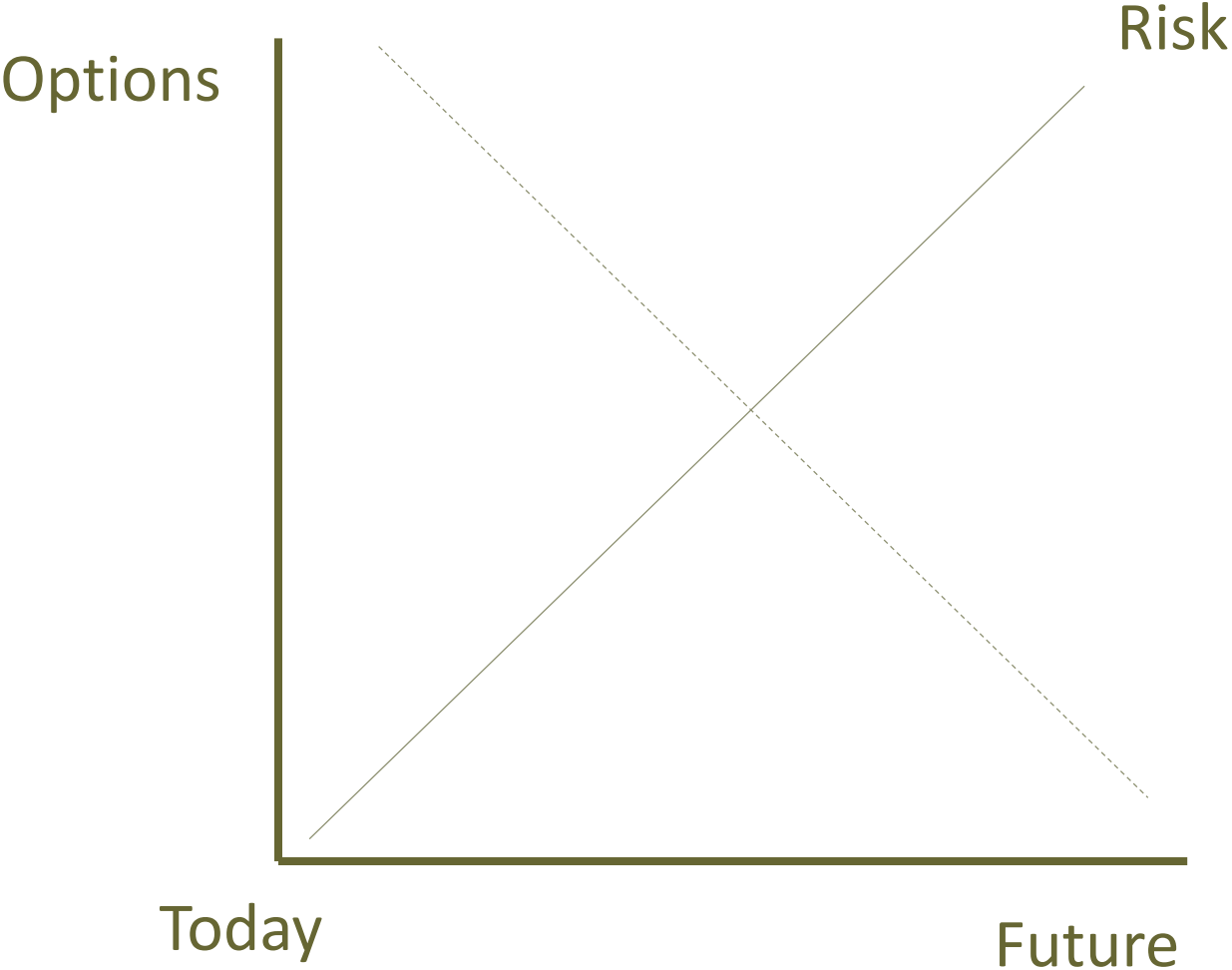


Working
Minds...

The 3 headed monster

Thinking v Perception v Perspective

Why bother?



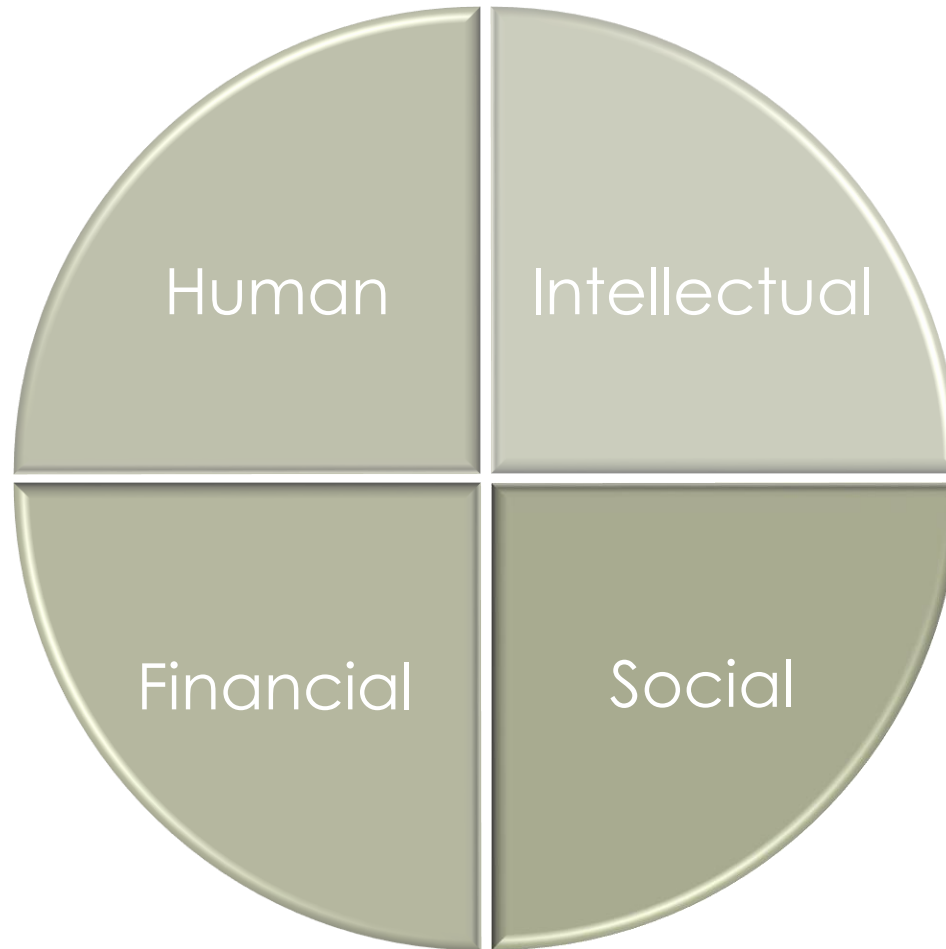
Working
Minds...

The all important question...

‘Legacy’

Working
Minds...

Four Components of Wealth



6 Decision making biases

- Negativity bias
- Loss aversion
- Anchoring bias
- Availability bias
- Endowment effect
- Overconfidence bias

Tips, tricks & Learnings

- The Village – for ‘you & them’
- Stick to your swim lane
- Change is your biggest reset opportunity
- Paper is your friend
- Boundaries & mixed messages
- Time is a beautiful thing
- Rhythm – train your clients
- Rites and rituals
- Realisations
- Encourage learning & development
- ‘the difference between motivation & confidence’
- Stories

Questions?