

Packed with insights and practical guidance, this essential collection of recommended books has you covered on the topics of interest:

- [Enterprise Families](#)
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- [Wealth Management](#)



► Enterprise Families

[Build an Enterprise Family to Last:](#)

[Proven Strategies to Thrive Across the Generations](#) (the complimentary introduction is available for download)

Sara Hamilton and Margaret Vaughan Cox, 2024

FOX founder Sara Hamilton, together with Margaret Vaughan Cox, describes what a complex enterprise looks like and shares a new framework that distinguishes the Family Journey, the Enterprise Journey, and the Personal Journey. This practical guide offers 48 actionable steps to ensure that family members and their Family Enterprise flourish into future generations. Their methodology and milestones allow each family to explore where they are today, where they want to go in the future, and how they plan to get there.

[Borrowed from Your Grandchildren: The Evolution of 100-Year Family Enterprises](#)

Dennis T. Jaffe, 2020, *adapted description from Amazon.com*

While creating wealth is a wonderful achievement, business families are also concerned with how their wealth is used to support their values, the lives of their children, and the well-being of the community. Over several generations, families who are successful in growing their wealth have been able to reinvent themselves and their business in the face of significant environmental transformations and internal differences caused by family dynamics. *Borrowed from Your Grandchildren* is a fascinating look at how large, long-lasting business families succeed across generations.

▶ Family Journey

[The Spirit of Wealth Preservation: Leverage Your Finite Life for the Infinite Good](#)

Ken Polk, 2025, *adapted description from Amazon.com*

With decades of experience advising affluent families, Ken Polk masterfully integrates principles of financial stewardship with the human aspects of legacy: character, relationships, and purpose. At the heart of this book are the “Laws of Preservation,” which provide actionable strategies to ensure wealth becomes a tool for creating thriving families, strong communities, and meaningful lives. Drawing from personal stories and professional insights, Polk offers a rare blend of practical advice and profound wisdom for anyone grappling with questions on how to align wealth with values, foster multigenerational success, and preserve what truly matters.

[First Generation Wealth: Three Guiding Principles for Long-Lasting Wealth and an Enduring Family Legacy](#)

Robert Balentine and Adrian Cronje, 2024, *adapted description from Ballentine Partners and Amazon.com*

First-generation wealth creators have a priceless opportunity to lay the groundwork for lasting family wealth and avoiding what is known in the field as the Shirtsleeves-to-Shirtsleeves phenomenon. In this book, preeminent wealth management experts and seasoned entrepreneurs Robert Balentine and Adrian Cronje of the storied wealth management firm Balentine LLC help readers think through in a very personal way what it takes to build a meaningful legacy and best support future generations. They offer their first-hand perspective on not only the financial, but also the emotional and psychological challenges that entrepreneurs commonly face and share their three guiding principles for long-lasting wealth and an enduring family legacy.

[Engaged Healthy, Wealthy & Wise](#)

Coventry Edwards-Pitt, 2023, *adapted description from Ballentine Partners and Amazon.com*

At a certain level of wealth, money makes parenting harder, not easier. *Raised Healthy, Wealthy & Wise* breaks new ground in the field of raising children amid wealth by hearing from the success stories: real-life children with wealth now grown into happy and productive adults. Through the voice of the inheritors and their significant others, lessons are shared on how they have navigated love and family wealth and forged their own joint path to lead fulfilling lives.

[Generations: The Real Differences Between Gen Z, Millennials, Gen X, Boomers, and Silents—and What They Mean for America’s Future](#)

Jean M. Twenge, 2023, *adapted description from Amazon.com*

Professor of psychology and “reigning expert on generational change,” Jean Twenge summarizes three decades of research and survey data from 39 million people to paint a portrait of six American generations. With her clear-eyed and insightful voice, Twenge explores what the Silents and Boomers want out of the rest of their lives; how Gen X-ers are facing middle age; the ideals of Millennials as parents and in the workplace; and how Gen Z was changed by COVID, among other fascinating topics. Surprising, engaging, and informative, *Generations*, will forever change the way you view your parents, peers, coworkers, and children, no matter which generation you call your own.

[The Myth of the Silver Spoon: Navigating Family Wealth and Creating an Impactful Life](#)

Kristin Keffeler, 2022, *adapted description from Amazon.com*

Being raised in affluence brings a unique set of pressures and hidden tripwires. By navigating those challenges without succumbing to fears and negativity, inheritors and their families can create a more purposeful path. Through new research, meaningful storytelling, and actionable concepts, *The Myth of Silver Spoon* offers a compassionate discussion and a seven-step process for connecting a rising gen's innate strengths to the embers of their hopes, so that they can move forward creating thriving and impactful lives.

[Bridging Generations: Transitioning Family Wealth and Values for a Sustainable Legacy](#)

Roy O. Williams and Amy A. Castoro, 2017, *adapted description from Amazon.com*

From years of field experience working with families and their trusted advisors, Roy O. Williams and Amy A. Castoro take the conversation on preparing heirs to a new level of understanding and action. This book provides insights, strategies, and compelling stories on how family wealth and family values can be successfully passed on from one generation to the next, and with the family unity intact.

[Shoe Dog: A Memoir by the Creator of Nike](#)

Phil Knight, 2016, *adapted description from Amazon.com*

In this candid and riveting memoir, Nike founder and board chairman Phil Knight shares the inside story of the company's early days as an intrepid start-up and its evolution into one of the worlds most iconic, game-changing, and profitable brands. Wrestling with life's Great Questions when he was twenty-four years old and backpacking through Asia, Europe, and Africa, Knight decided the unconventional path was the only one for him. Rather than work for a big corporation, he would go on to create something all his own, something new, dynamic, different.

[Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times](#)

Mark Haynes Daniell and Sara Hamilton, 2010, *adapted description from Amazon.com*

Family legacy and leadership are important subjects that have a great influence on the future of the family as a whole and a profound impact on the lives of its individual members. Although each family has its own history and unique destiny, this book will bring to all families a deeper understanding of their legacies and a practical approach to their leadership. As a result, leaders, members, and advisors alike will be able to manage comfortably both the continuity and change that families require.

► Family Learning

[The 10x10 Learning Roadmap](#)

Stephen Goldbart, Stacy Allred, and Joan DiFuria, 2024,
adapted description from the James E. Hughes, Jr. Foundation

This groundbreaking book born from years of experience as a family wealth consultant, provides a holistic approach to tailored, lifelong learning and development. From the book, learn about the 10 core competencies across each of life's 10 stages (from ages 5-100) to effectively navigate the opportunities and challenges of financial wealth. These competencies are a specific set of abilities that support the growth of emotionally intelligent, financially effective, and self-sufficient family members.

Money Skills for Teens: A Beginner's Guide to Budgeting, Saving, and Investing

Ferne Bowe, 2023, *adapted description from Amazon.com*

While the teenage years are exciting times, they can also be daunting. With so much to learn and so many new experiences, it's easy to feel overwhelmed by the responsibility of growing up. And when it comes to money, it's crucial to know how to manage it. Using real-life examples and easy-to-understand language, this book provides practical advice to help teens develop a healthy relationship with money. From budgeting and saving for emergencies to investing in stocks and using credit responsibly, this book is the go-to beginner's guide to personal finance for teenagers.

Prepared: What Kids Need for a Fulfilled Life

Diane Tavenner, 2019, *adapted description from Amazon.com*

Through personal stories and hard-earned lessons from the Summit Public Schools's exceptional team of educators and diverse students, Diane Tavenner shares the learning philosophies underlying the Summit model and offers a blueprint for any parent who want to stop worrying about their children's future—and start helping them prepare for it.

The Opposite of Spoiled: Raising Kids Who Are Grounded, Generous, and Smart About Money

Ron Lieber, 2015, *adapted description from Amazon.com*

Grounded in real-world experience and stories from families with a range of incomes, *The Opposite of Spoiled* is both a practical guidebook and a values-based philosophy. The book delivers a taboo-shattering manifesto that explains how talking openly to children about money can help parents raise modest, patient, grounded young adults who are financially wise beyond their years.

Raising Financially Fit Kids

Joline Godfrey, 2003, *adapted description from Amazon.com*

At the heart of the book is a developmental map covering 10 specific money skills children can master before the age of 18 to become financially secure adults. More than just a money book, *Raising Financially Fit Kids* will help parents send kids into the world as balanced young adults who exercise good judgment, practice responsible habits, and live financially stable lives.

► Family Office**Building a Sustainable Family Office: An Insider's Guide to What Works and What Doesn't**

Scott Saslow, 2024, *adapted description from Amazon.com*

With an insider's experience of someone who has built and run a family office, Scott Saslow takes on the inherently complex landscape of the family office and makes it accessible and understandable. Step by step, Saslow provides insightful guidance and practical ideas for how to begin to design, build, or refine an effective family office.

[Family Office Navigator: Your Guide to Building a Multigenerational Family Office](#)

Peter Vogel, 2023, *adapted description from Amazon.com*

In today's complex world, family officers play a pivotal role in safeguarding a family's heritage and unity while preserving and growing generational wealth. As the world around us evolves, so too must family offices adapt to meet the changing needs of their families. *The Family Office Navigator* is an essential guide for establishing and managing a family office, equipping you with practical frameworks and actionable insights for every step of your journey.

[The Complete Family Office Handbook: A Guide for Affluent Families and the Advisors Who Serve Them](#)

Kirby Rosplock, 2020, *adapted description from Amazon.com*

Through research and cutting-edge insights from thought leaders in the family office sector, this updated and revised handbook provides practical tools, templates, and exercises to guide family office practitioners as they create plans for their family office. It's an indispensable resource for family office executives and the families they serve. The handbook also includes case studies, examples, and a dedicated chapter on establishing a family bank and another chapter on establishing a private trust company that will be invaluable to family offices.

[The Family Office: A Comprehensive Guide for Advisers, Practitioners, and Students](#)

William I. Woodson and Edward V. Marshall, 2021, *adapted description from Amazon.com*

The veteran practitioners William I. Woodson and Edward V. Marshall offer a thorough guide to family offices: why wealthy families create them, what they do, and how to manage them effectively. They present these insights through a series of problem-based learning cases that follow a single family's journey from the time of a significant liquidity event; through the creation, staffing, and management of their family office; and on to its succession.

▶ Family Philanthropy

[A Generous Life: Reflections on Inspired Giving](#) (a complimentary copy is available for download)

Peter Karoff, 2024, *adapted description from Jay Hughes Foundation*

In 1989, Peter Karoff, a businessman with a passion for social justice, had an idea that would fuse his financial expertise with his drive for doing good: he would found a nonprofit consulting firm—among the first of its kind in the country—to help donors decide where and how to direct their giving. The Philanthropic Initiative (TPI) soon became a leader in the emerging field of strategic philanthropy. Since then, TPI has influenced the direction and focus of billions of dollars in philanthropy. In this book, Peter's reflections are compiled throughout this remarkable second act—lessons learned, provocative ideas, and stories about the power and potential of philanthropy.

[Family Philanthropy Navigator: The Inspirational Guide for Philanthropic Families on Their Giving Journey](#)

Peter Vogel, Etienne Eichenberger, Malgorzata Kurak, 2020, *adapted description from Amazon.com*

Philanthropy is an important and highly rewarding way for individuals and families to make a difference in a rapidly changing world. Like the world around us, philanthropy is changing and transforming, and philanthropic families are seeking out new ways to ensure that their giving is meaningful and impactful. *The Family Philanthropy Navigator* offers an easy-to-use, step-by-step inspirational guide for new and existing philanthropic families to initiate or enhance their journey in giving.

Putting Wealth to Work: Philanthropy for Today or Investing for Tomorrow?

Joel L. Fleishman, 2017, *adapted description from Amazon.com*

By 2025, Americans will likely be donating over half a trillion dollars annually to nonprofit organizations. Those philanthropic gifts will transform significant parts of America's civic sector landscape. In *Putting Wealth to Work*, Joel L. Fleishman provides expert analysis of contemporary philanthropy, offering invaluable insight for those engaging with and affected by charitable foundations.

► Family Relations**Conflict Resilience: Negotiating Disagreement Without Giving Up or Giving In**

Robert Bordone and Joel Salinas MD, 2025, *adapted description from Amazon.com*

Serving as a guide with scientifically proven tools, this book shows how having a conflict resilience mindset—the ability to not only sit with and grow from disagreement, but to find new ways to communicate with authority and confidence without others feeling left unheard—can bring people and families together.

The Quest for Legitimacy: How Children of Prominent Families Discover Their Unique Place in the World

Jamie Weiner, 2022, *adapted description from Amazon.com*

Relying on qualitative research conducted on wealthy families, Dr. James Weiner delivers a unique and eye-opening discussion of the Rising Generation's quest for self-determination in the shadow of a larger-than-life family. This is an essential read for anyone navigating the complex dynamics of accomplished families.

Fault Lines: Fractured Families and How to Mend Them

Karl Pillemer Ph.D., 2020, *adapted description from Amazon.com*

Estrangement from a family member is one of the most painful life experiences. It is devastating not only to the individuals that are directly involved, but it can become collateral damage that extends upward, downward, and across generations. In this book, Karl Pillemer combines the advice of people who have successfully reconciled with powerful insights from social science research. The result is a unique guide to mending fractured families.

We Need to Talk: A Memoir About Wealth

Jennifer Risher, 2020, *adapted description from Amazon.com*

When Jennifer Risher joined Microsoft in 1991, she met her husband, and with him became an extra-lucky beneficiary of the dot-com boom. By their early thirties, they had tens of millions of dollars. Jennifer's thought-provoking, personal story includes the voices of others in her demographic and explores the hidden impact of wealth on identity, relationships, and sense of place in the world. At a time when money is still a taboo subject, Jennifer's memoir, *We Need to Talk*, is a catalyst for conversation that demystifies wealth and inspires us to connect. In a discussion with Mindy Earley at the [2021 FOX Family Forum](#), Jennifer shares more thoughts on the hidden impact of wealth.

▶ Human Capital

Artificial Intelligence for HR: Use AI to Support and Develop a Successful Workforce

Ben Eubanks, 2025

Artificial intelligence (AI) is changing the world of work. How can HR professionals understand the variety of opportunities AI has created for the HR function and how best to implement these in their organizations? This book provides the answers. From using natural language processing to ensure job adverts are free from bias and gendered language to implementing chatbots to enhance the employee experience, artificial intelligence can add value throughout the work of human resources professionals.

Open Talent: Leveraging the Global workforce to Solve Your Biggest Challenges

John Winsor and Jin H. Paik, 2024, *adapted description from Amazon.com*

In this essential guidebook, John Winsor and Jin Paik, with their work at the Laboratory for Innovation Science at Harvard, show how the massive reset of the pandemic allowed talented workers everywhere to exit their jobs without leaving the workforce. Given this landscape and the need to adapt, the key is to shift to a *networked organization*, where talent is culled from both inside and outside the organization and viewed through a single lens—as a global ecosystem that can be tapped as needed. With rich stories, keen insights, and an abundance of practical advice, Winsor and Paik provide a new framework and operating model for transforming your organization into a talent-orchestrating, problem-solving machine.

The Ideal Team Player: How to Recognize and Cultivate the Three Essential Virtues

Patrick Lencioni, 2016, *adapted description from Amazon.com*

Beyond the fable, this book presents a practical framework and actionable tools for identifying, hiring, and developing ideal team players. Whether you are a leader trying to create a culture around teamwork, a staffing professional looking to hire real team players, or a team player wanting to improve yourself, this book will prove to be as useful as it is compelling.

▶ Investment Management

Shocks, Crises, and False Alarms: How to Assess True Macroeconomic Risk

Philipp Carlsson-Szlezak and Paul Swartz, 2024, *adapted description from Amazon.com*

In this perspective-shifting book, BCG Chief Economist Philipp Carlsson-Szlezak and Senior Economist Paul Swartz provide a fresh and accessible way to assess macroeconomic risk. Casting doubt on conventional model-based thinking, they demonstrate a more powerful approach to building sound macroeconomic judgment.

Winning the Loser's Game: Timeless Strategies for Successful Investing, Eighth Edition

Charles D. Ellis, 2021, *adapted description from Amazon.com*

Producing investing results that overcome operating costs and fees is becoming harder amid the technological evolution, information overload, and increasing market dominance by expert investors. With this book focusing on timeless strategies for successful investing, you can learn about the process of developing and implementing a powerful investing strategy that generates solid profits year after year.

This updated edition includes new chapters on bond investing, new research and evidence supporting the case for indexing investment operations, and new insights into the role of governance, developing a comprehensive saving strategy, and the power of regression to the mean.

[The Taxable Investor's Manifesto: Wealth Management Strategies to Last a Lifetime](#)

Stuart E. Lucas, 2020, *adapted description from Amazon.com*

With the deep industry knowledge of a seasoned practitioner, *The Taxable Investors Manifesto* sensibly folds tax incentives into investment strategy in ways that can add profound value over a lifetime to actual results. It includes guidance on how to keep a greater percentage of your profits with a higher probability of success and less effort; why it is important to manage the intersection of investment, tax, and estate planning; and how to compete for better long-term investment returns against tax-exempt investors.

[The Complete Direct Investing Handbook: A Guide for Family Offices, Qualified Purchasers, and Accredited Investors](#)

Kirby Rosplock, PhD, 2017, *adapted description from Amazon.com*

This specialized guide and resource take you through pre- and post-considerations of direct investing. Several chapters are contributed by leading practitioners in the field who share their insights and experiences of using the direct investing strategy. Relevant case examples and research bring the material to life and shed light on the realities of direct investing globally. Additionally, you can discover a practitioner's lens to sourcing, screening, and ultimately deploying capital into direct investments individually or as a co-investor. Learn how to create a direct investment thesis and to strategically execute, monitor, and exit a direct investment.

► Lifestyle Services

[Saving the Family Cottage: A Guide to Succession Planning for Your Cottage, Cabin, Camp, or Vacation Home](#)

Stuart J. Hollander, Rose Hollander, and David S. Fry, 2021, *adapted description from Amazon.com*

Shared ownership of vacation property—especially when the co-owners are family members—can be fraught with problems. The idyllic dream of a cottage getaway can be shattered when co-owners' emotions, financial concerns, and opinions on how the property should be used come into play. Fortunately, a solid plan that dictates how the property will be owned and managed can prevent squabbles over the family cottage.

[How to Find, Hire, and Keep the Right Domestic Professionals: The Household Employer's Guide to Hiring Great Employees Who Will Stay for Years](#)

Aleksandra Kardwell, 2019, *adapted description from Amazon.com*

Over the years, Aleksandra Kardwell has learned a great deal about the needs of household employers, gaining an in-depth understanding of what works in domestic hiring. In *How to Find, Hire and Keep the Right Domestic Professionals*, she shares her experience, insights from thought leaders in the staffing field, and findings from a key employment research. This practical, hands-on book is filled with timely information and actionable advice to help you identify, hire, and keep the right people for your unique needs and preferences. Follow the advice in this guide and transform your rate of success in household employee selection.

Passing It On: The Inheritance and Use of Summer Houses and Family Cottages + Workbook

Judith Huggins-Balfe and Ken Huggins, 2015, *adapted description from Amazon.com*

Passing It On focuses on the sociological and family-dynamics involved in sharing real property rather than merely on the legal issues of estate reduction. It includes extensive quotes from over 100 summer-house heirs, about how they have managed to keep the property in the family over generations. Included is the companion guide: *How to Pass It On*, a workbook to help put into effect the practical aspects of Informal and Formal Operating Agreements, Practices & Policies, and other necessary agreements.

► Operating Businesses**Hug of War: How to Lead a Family Business with both Love and Logic**

Cathy Carroll, 2024, *adapted description from Ballentine Partners and Amazon.com*

When the competing impulses of the family mindset and the business mindset are embraced as a polarity, leaders transcend either-or thinking and craft better solutions that embrace the best of both mindsets. With stories that take you into the hearts and heads of real-life family business leaders, *Hug of War* offers a bridge to greater harmony in your family, greater clarity in your mind, and greater peace in your heart.

Founder Paralysis: A Family Business Fable About a Founder's Loss of Identity

Dennis Passis, 2024, *adapted description from Amazon.com*

In this family business fable, a founder confronts the daunting prospect of business succession. The journey reveals the deep-seated fears and resistance that many founders experience. Through relatable characters and an engaging narrative, this book explores themes of identity, legacy, and the intricate dynamics of family businesses. Readers will gain insights into the often unspoken challenges of succession planning.

Your Business, Your Family, Your Legacy: Building a Multigenerational Family Business That Lasts

George A. Isaac, 2020, *adapted description from Amazon.com*

Whether you are an experienced family business or family office executive, board member, owner, or next-generation family member, George Isaac has written the definitive handbook on the challenges of managing a multi-generational family enterprise. This book discusses best practices for all the key issues associated with family businesses.

The Infinite Game

Simon Sinek, 2019, *adapted description from Amazon.com*

In this revelatory book, Simon Sinek offers a framework for leading with an infinite mindset, where leaders commit to a vision of a future shaped from five essential practices: advancing a Just Cause; building trusting teams; studying your worthy rivals; preparing for existential flexibility; and demonstrating the courage to lead that will leave their organizations in a better condition than they found them.

► Technology

[Welcome to AI: A Human Guide to Artificial Intelligence](#)

David L. Shrier, 2024, *adapted description from Amazon.com*

With the world of artificial intelligence rapidly advancing, this actionable book cuts through the hype and gets to the heart of what business leaders and their teams need to know to prepare for the disruption that is already happening. *Welcome to AI* further illustrates how this powerful AI technology will continue to impact our lives, our careers, and our world.

[Co-Intelligence: Living and Working with AI](#)

Ethan Mollick, 2024, *adapted description from Amazon.com*

A definitive playbook for working, learning, and living in the new age of AI, this book shows what it means to think and work together with smart machines, and why it's imperative that we master that skill. It also challenges us to utilize AI's enormous power without losing our identity, to learn from it without being misled, and to harness its gifts to create a better human future. Wide-ranging, thought-provoking, optimistic, and lucid, *Co-Intelligence* reveals the promise and power of this new era.

[The AI-Savvy Leader: Nine Ways to Take Back Control and Make AI Work](#)

David De Cremer, 2024, *adapted description from Amazon.com*

In the new world of human-machine collaboration, leaders must know how to connect their use of AI to their strategies. Clearly and concisely, this book focuses on the nine actions leaders need to take to successfully preside over the transition to a more AI-centric future that will lead to growth for all—companies and workers—and avoid the kinds of mistakes that early adopters make.

[The Age of AI: And Our Human Future](#)

Henry A. Kissinger, Eric Schmidt, and Daniel Huttenlocher, 2022, *adapted description from Amazon.com*

In *The Age of AI*, three leading thinkers have come together to consider how AI will change our relationships with knowledge, politics, and the societies in which we live. *The Age of AI* is an essential roadmap to our present and our future, and era unlike any that has come before.

[Managing Electronic Records: Methods, Best Practices, and Technologies](#)

Robert F. Smallwood, 2013, *adapted description from Amazon.com*

Many businesses are woefully unprepared to meet today's electronic records management (ERM) challenges and, as a result, remain exposed to significant legal and competitive risks. *Managing Electronic Records* gives professionals the tools to not only mitigate risk, but also position their organizations to leverage the many benefits that flow from effective records and data management. This comprehensive guide offers users both a strategic overview of current ERM issues and a practical road map for implementing specific ERM solutions.

Everything is Miscellaneous: The Power of the New Digital Disorder

David Weinberger, 2008, *adapted description from Amazon.com*

Business visionary and bestselling author David Weinberger charts how as business, politics, science, and media move online, the rules of the physical world—in which everything has a place—are upended. In the digital world, everything has its place, with transformative effects. With the shift to digital music standing as the model for the future in virtually every industry, *Everything is Miscellaneous* shows how anyone can reap rewards from the rise of digital knowledge.

► Trust and Estate Planning**The Way of the Trustee** (a complimentary copy is available for download)

Daniel P. Felix, 2024, *adapted description from Jay Hughes Foundation*

Through a holistic approach built on years in practice, Daniel P. Felix offers a comprehensive trustee playbook incorporating innovative processes for resolving the problems embedded in all trusts, grounded guidance on manifesting loyalty, and practical insights into the range of trustee tasks and relationships. His spirituality-based and balanced approach provides value to all stakeholders within the trust administration process, with an emphasis on helping families flourish.

The Beneficiary Primer: A Guide for Beneficiaries of Family Trusts

Patricia M. Angus, 2020, *adapted description from Amazon.com*

Written by an expert who has more than two decades of experience working with families to create, administer, and benefit from trusts, this primer is a "go-to" resource for anyone who has been named as a beneficiary. The text incorporates a worksheet throughout that can help you organize information, thoughts, and questions, to set you up for a positive, productive experience. Key concepts are distilled to their essential elements. This primer is also helpful for anyone setting up a trust as part of an estate plan or for a trustee of a family trust.

The Trustee Primer: A Guide for Personal Trustees

Patricia M. Angus, 2015, *adapted description from Amazon.com*

An essential guidebook for individuals who have been named as trustee of personal trusts for family members or friends. With more than two decades of experience working with families to create, administer, and benefit from trusts, this primer is a must-read resource for anyone who has been named as a trustee. By breaking down complicated elements, this primer is a great starting point—or refresher—for understanding trusts and what it means to be a trustee.

Family Trusts: A Guide for Beneficiaries, Trustees, Trust Protectors, and Trust Creators

Hartley Goldstone, James E. Hughes, Jr., and Keith Whitaker, 2015, *adapted description from Amazon.com*

Marrying the practical and emotional aspects of family wealth, this book provides a hands-on primer that focuses on fostering positive relationships and structuring the trust appropriately for the situation and the people involved. Written by a team of experts in family wealth, this information is becoming increasingly crucial to the successful execution of a trust. From the book, you will learn what type of person makes the best trustee, how to be an excellent beneficiary, and the technical aspects that help you build a better trust from the very beginning.

► Wealth Management

Wealth 3.0: The Future of Family Wealth Advising

James Grubman, Dennis T. Jaffe, Kristin Keffeler, 2023, *adapted description from Amazon.com*

More than four decades ago, the field of family wealth advising began to emerge as a challenge to the tradition of caring only about the money. We now stand at the threshold to the next major transformation, strengthening the focus on family while shedding the fears and flaws that invaded beliefs about the rich. Written by three renowned experts, *Wealth 3.0: The Future of Family Wealth Advising* outlines how the field arrived at this point and what will be needed to establish a positive vision of family wealth. Through relatable stories and insightful recommendations, *Wealth 3.0* is a modern manifesto. It challenges family wealth advising to become the enduring, scalable, rigorous profession it was always destined to be.

Wealth of Wisdom: Top Practices for Wealthy Families and Their Advisors

Tom McCullough and Keith Whitaker, 2022, *adapted description from Amazon.com*

In *Top Practices for Wealthy Families and Their Advisors*, accomplished family wealth experts Tom McCullough and Keith Whitaker deliver a comprehensive collection of practical activities that members of wealthy families can undertake to ensure their continued success and development. This book provides top practices and tools on how to identify the factors that matter most when it comes to retaining and growing family wealth; invest wisely; raise the next generation; share their decision making through a prudent process; and incorporate charitable giving into an overall wealth strategy. It's an indispensable resource for managers of family trusts seeking to protect and advise their clients.

Wealth of Wisdom: The Top 50 Questions Wealthy Families Ask

Tom McCullough and Keith Whitaker, 2018, *adapted description from Amazon.com*

Managing significant family wealth is a complex affair, offering both opportunities and challenges. And those challenges have been on the rise with unprecedented transfer of wealth across the generations, shifting definitions of family, globalization, evolving family dynamics, increasing longevity, and massive wealth creation. By compiling the 50 most common questions and answers framed around nine categories—including investing wisely, raising the rising generation, and making shared decisions—this book is a practical, on-the-ground, how-to guide that will answer the key questions that every family of wealth wrestles with on a regular basis.

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