The part your estate plan doesn't cover.

Your estate plan says who gets what after you're gone. It doesn't say how your family runs together while everyone is still here: who decides what, how you talk about the hard stuff, what happens when someone wants something different.

SOUND FAMILIAR?

- Certain topics got harder to bring up, so nobody does.
- One person holds it all together, and it's wearing on them.
- People are playing roles they never chose.
- Spouses and kids live with decisions they never had a say in.
- Nobody knows what happens if someone wants out.

THE FAMILY OFFICE OPERATING SYSTEM™

Wealthy families have long had family offices: the meetings, roles and ground rules that keep a family running together across generations. FOOS™ brings those same tools to any family with shared assets, like a business, real estate, investments or land, whatever the size.

The model. The Four Laws: Perspective, Conversation, Identity, Structure.

The tools. A family map, every voice in writing, a roles map, ground rules and a meeting agenda, with more as the system grows.

The rhythm. We start it with the 30-Day Family Diagnostic. Your family keeps it: a meeting every quarter and a vision and values refresh every year.

STEP ONE

The 30-Day Family Diagnostic

Week 1	Perspective	A one-on-one with each adult: what they see, carry and need.	60 min each
Week 2	Conversation	A short private workbook on what makes it safe to speak up.	About 1 hr
Week 3	Identity	A short private workbook on each person's role: chosen or inherited.	About 1 hr
Week 4	Structure	Whole-family session on what we found.	2 hrs

YOU WALK AWAY WITH

- **Every voice, in writing:** what each person needs, in their own words.
- **A one-page map of your family:** who's involved, what's shared, who decides what.
- **Your next family meeting on the calendar,** its agenda set by the three things your family prioritized.

$7,500
Charter rate, three families

Your whole family, up to 8 adults. In person or over Zoom; travel billed at cost. $12,500 after the charter round.

We don't give legal, tax, financial or counseling advice. We work alongside your attorney, CPA and advisors, not in place of them.

Next step: a 30-minute call.

Scan to book. We'll talk through what's going on in your family and whether this fits. If it doesn't, we'll tell you.

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