

INTENTIONAL FAMILY WEALTH

A Conscious Leadership Forum

with Sue Heilbronner and Scott Peppet

This six-month forum offers an opportunity to develop a more intentional, self-aware, engaged, and integrated approach to family wealth.

Led by seasoned Conscious Leadership practitioner Sue Heilbronner and Scott Peppet, thought leader and President of a multi-generational family office and trust company, participants will acquire game-changing skills of Conscious Leadership in service of reaching their highest possible level of success in work and life.

This forum offers an opportunity to learn and practice authentic leadership and to receive invaluable coaching, new perspectives, and candid feedback on issues associated with a conscious approach to family wealth. In addition to the benefit of deep engagement with two skilled facilitators, participants also will learn from and with a cohort of similarly situated family members, who share their wants and their fears in an intimate, confidential, trusted setting.

THE "WHY"

Based on their work in Conscious Leadership and with the myriad dynamics of family wealth, Scott and Sue are developing this forum to allow families to make some key shifts in service of greater impact and personal satisfaction:

- **Shifting from Obligation to Opportunity:** Helping family members integrate and deploy their resources for their own and the world's benefit.
- **Shifting from Secrecy to Intentional Transparency:** Convening authentic conversations about stuff that matters most.
- **Shifting from Drama to Presence Around Wealth:** Developing skills and a mindset required to build a highly relational, integrated, conscious family-centered office.

THE FACILITATORS



Sue Heilbronner is a sought-after speaker, startup CEO, mentor, adjunct professor of entrepreneurship, facilitator, strategic advisor, Conscious Leadership coach, co-founder of the MergeLane investment fund, creator of the Leadership Camp training program for high-potential leaders, former federal prosecutor, and a direct and fearless catalyst for change. Learn more about Sue at [HeySue.com](https://www.heySue.com)



Scott Peppet is the President of a multi-generational family office and private trust company, a Board member for both private and public companies, a well-known writer in the family wealth space, a facilitator of difficult but generative conversations for corporate and family leaders, a former law professor, an expert on negotiation and conflict, and a lifelong Zen practitioner. Learn more about Scott at [ScottPeppet.com](https://www.ScottPeppet.com)

THE "WHO"

- Family members – no advisors – who do or will at some point control or benefit from significant family business assets or wealth
- Age 25+
- Willing to make the six-month time commitment below
- Game to take conscious responsibility for their influence in the world as leaders
- Committed to curiosity, value learning over being right, and are open to giving and receiving feedback

THE "WHAT"

- This program is comprised of a two-day kickoff, four 3-hour monthly sessions, and a one-day culmination experience.
- In between our live sessions, participants will engage at least once with a "learning partner" from the program.
- Participants also will have the option of two 1-on-1 coaching sessions with Sue or Scott.
- All sessions will be remote and attendance is mandatory. One missed monthly session is acceptable. If safety and interest permit, the culmination session will take place in-person in Boulder, Colorado.



"The combination of Sue and Scott makes for deep, vulnerable, transformative conversations about money, family, and leadership."

THE DIFFERENCE

There are many peer groups for family stakeholders, leaders, and inheritors. This forum is different because it is grounded on a deep foundation of Conscious Leadership skills, tools, and frameworks. The goal is to learn to show up authentically as a leader, to develop a group IQ/EQ with shared intent, and then turn that to the particular issues of family wealth, family business, and family leadership.

THE INVESTMENT

\$15,000 per person for the six-month program.

THE "WHEN"

The six-month program begins in April 2021. See detailed schedule below.

LEARN MORE

HeySue 

HEYSUE.COM/FAMILY

Scott Peppet

SCOTTPEPPET.COM

2021 Program Schedule

INTENTIONAL FAMILY WEALTH

April
8-9th

Zoom

2-day immersive kick-off session with Sue and Scott
Thursday, 9am - 12pm and 1pm - 4pm MT
Friday, 9am - 12pm and 1pm - 4pm MT

May
20th

Zoom

1 three-hour, all-group session & topical deep dive
Thursday, 4pm - 7pm MT
Peer-to-peer coaching meetings

June
23rd

Zoom

1 three-hour, all-group session & topical deep dive
Wednesday, 4pm - 7pm MT
Peer-to-peer coaching meetings

July
15th

Zoom

1 three-hour, all-group session & topical deep dive
Thursday, 4pm - 7pm MT
Peer-to-peer coaching meetings

August
19th

Zoom

1 three-hour, all-group session & topical deep dive
Thursday, 4pm - 7pm MT
Peer-to-peer coaching meetings

September
14th

Zoom

1-day immersive culmination session with Sue and Scott
Tuesday, 9am - 12pm and 1pm - 4pm MT