

Beyond the Numbers: Building Lasting Relationships with Families of Wealth

Presented by John E. Messervey
Private Advisor to America's Leading Families™

In this thought provoking session, internationally known family wealth consultant John Messervey will present “lessons learned” from almost 400 high net worth families over the past 30+ years. John will share techniques to strengthen family relationships, guide succession, and the optimize the family dynamics woven throughout intra and inter generation wealth transfer.

Through case studies and interactive discussion, John will offer techniques that lead consultants to “most trusted advisor” status in the family. Special emphasis will be placed upon improving communication, enhancing relationship skills and crafting “therapeutic” approaches for even the most experienced professional advisor.

This Session will explore:

- » Integrating an understanding of family systems into the work of professional advisors
- » Models for creating change within a family
- » Methods of increasing family harmony (and decreasing family anxiety)
- » Why certain clients just seem to respond better—recognizing client transference and counter transference
- » Understanding the psychology of the entrepreneur
- » Parenting skills for the next generation of heirs
- » Rewiring family communication patterns around wealth; gender, inter-generation, spouses and in-laws

For available dates, fees and arrangements, please email:
john@privatefamilyadvisor.com or call 847.295.0295

Recent Evaluation:

“There is nothing ‘soft’ about what John is sharing. I now have a new way to relate to my clients—lessons John shared will fine tune my approach and broaden my practice.”

About John Messervey



John Messervey is an organization behavior consultant who counsels high wealth families throughout the United States and overseas. Among the most experienced family business/wealth consultants, Mr. Messervey resolves complex issues of family business leadership, growth and strategy, generational transfer of wealth, family dispute resolution and mediation, next generation coaching and mentoring, family office governance, management succession and related issues of earned/inherited wealth.

John has consulted with almost 400 families throughout the U.S., Europe and Asia. He often guides families, owners and managers through very difficult conversations and is known for resolving intricate behavioral challenges.

Mr. Messervey has presented to a variety of groups including the Young Presidents' Organization (YPO), the Menninger Management Institute, Goldman Sachs, JP Morgan/Chase, Merrill Lynch, Northern Trust, Baird, William Blair and the Newport Global Summit. John is a featured family business advisor having appeared on ABC, CBS, CNBC, and NPR.

Mr. Messervey holds a Master's degree in Organization Behavior from the Kellogg Graduate School of Management at Northwestern University; he is an Economics graduate of Miami University in Oxford, Ohio.

John has served as an advisor to four philanthropic boards in the fields of education, social and economic policy, arts and the environment.

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