BRAND ASSET MANAGEMENT GROUP
A Mosaic of Financial Experts

Mosaic Legacy

Preserving Wealth Through Purpose, Story, and Connection

Mosaic Legacy is a deeply personalized service designed to help affluent families preserve and transfer not just their wealth, but their values, vision, and identity to future generations. It is a cornerstone of our Family Office offering and is also available as a standalone service for families who recognize the importance of intentional legacy planning.

Why We Created Mosaic Legacy

Wealth alone does not ensure a lasting legacy. In fact, studies show that most family wealth is lost within three generations due to a lack of communication, trust, and shared purpose. Mosaic Legacy addresses this by helping families articulate and share their mission, vision, and values across generations assuring that financial inheritance is grounded in emotional wisdom, relational strength, and a clear sense of purpose across generations.

The service was born to address the needs of a client 20 years ago, when a family asked for help in communicating their intentions and values to their four adult children. That experience revealed a gap in traditional wealth management: attorneys, CPAs, nor financial advisors were helping families navigate the emotional and relational complexities of legacy. Mosaic Legacy fills that gap.

What You Can Expect

Mosaic Legacy facilitates multi-generational family meetings that are structured, emotionally resonant, and deeply impactful. These meetings are designed to:

- **Uncover and articulate family values**
- **Foster open communication between generations**
- **Prepare heirs for the responsibilities of wealth**
- **Preserve family stories, artifacts, and wisdom**
- **Strengthen family bonds and reduce future conflict**

Key Components

- Mission, Vision, and Values Creation: Families define their guiding principles and long-term aspirations.
- Legacy Letters: Parents write heartfelt messages to their children, often read aloud during meetings. (always preserved for future generations)
- Facilitated Family Meetings: Structured sessions led by seasoned advisors, tailored to each family's dynamics.
- Storytelling and Documentation: Through partnerships with firms like Story on Purpose and Anderson Archival, we capture family stories, preserve key documents and even family heirlooms and artifacts, via video, audio, and various written and digital formats.
- Heir Preparedness: Adult children and grandchildren are educated on roles, responsibilities, and the meaning behind the wealth they will inherit.
- Family Business Transition Support: For families with operating businesses, we help navigate succession, ownership, and emotional dynamics.

Service Tiers

Mosaic Legacy is offered in three tiers to accommodate different levels of complexity and engagement:

TIER 1

- One-time family meeting
- Focus on operational clarity (e.g., estate documents, roles, responsibilities)
- Ideal for families with aging parents or urgent planning needs
- Pre- and post-event interviews to gauge success and opportunities

TIER 2

- Periodic meetings
- Includes legacy letters, values discussions, and introductions to key advisors
- Begins to build a repeatable family meeting tradition

TIER 3

- Comprehensive, multi-year planned engagements
- Includes video interviews, archival preservation, heirloom documentation, and multi-generational education
- Designed for families seeking to build a lasting legacy infrastructure

Investment

- Included in the retainer for multi-family office clients
- Standalone pricing ranges from $10,000 to $100,000+ per event depending on scope, travel, and third-party services

Ideal Clients

- Families with significant wealth (both monetary + relational)
- Families with a strong sense of purpose and faith
- Families with operating businesses or complex dynamics
- Families who value communication, connection, and continuity

Deliverables

- Custom-designed family legacy plans
- Video and written documentation of family stories + history
- Meeting facilitation and follow-up coaching
- Optional printed or digital legacy books
- Ongoing support and meeting cadence planning
- Digital and physical preservation of key family items

Why It All Matters

We created Mosaic Legacy to help. Mosaic Legacy is not about money, it's about meaning. It's about helping families say the things that matter most, while they still can. It's about ensuring that future generations understand not just what they've inherited, but why — and how to carry it forward with purpose. Because when values and wealth are passed down together, we've found that both are more likely to endure. It's about ensuring that future generations understand not just what they've inherited, but why and how to achieve true success for their own future.

As one client said, "This was the best money we've ever spent with your firm."