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FAMILY CHARTER

SAFEGUARDING YOUR FAMILY'S FUTURE

Peter brings expertise in both family business dynamics and the creation of Family Charters. Supported by a Nuffield Farming Scholarship, his research across 15 countries led him to engage with over 100 family businesses, industry professionals, and leading academics to understand what truly makes family enterprises thrive. Combined with over 20 years of hands-on experience in his own family business, Peter has a unique perspective on the challenges and opportunities that come with running a family business. His insights help families navigate the complexities of working together, ensuring a shared vision for success.



“**Take Control of Your Legacy:** Don't leave your future to chance.
- Be proactive in shaping your family's journey.

Families are the foundation of so many businesses, and yet time and again they struggle to maintain harmony, communicate effectively, and agree on a shared vision across generations. Left unchecked both the family and the business suffer, sometimes to the point of no return. This **Family Charter Course** will reverse this trend and provide the tools you need to set you up for family business success. It is an interactive, step-by-step guide designed to help families align their values, set a clear direction, and establish a lasting framework. It creates an environment where openness, honesty and fairness can be respected, allowing you access to the 'Holy Grail' of successful family businesses - TRUST. By creating a **Family Charter**, you will strengthen your family unity, safeguard your legacy, and ensure long-term success – for you, your business and your family.

Family Charter - A strong family, a clear path, a lasting legacy

A Family Charter delivers clarity, confidence, and direction for the future. It ensures that everyone is working toward the same vision, strengthening bonds and securing long-term success.

- ☒ **Stay United** – Your family will feel connected by a shared purpose, with clear values and goals that bring everyone together.
- ☒ **Make Decisions with Confidence** – No more uncertainty. Your Family Charter becomes a trusted guide, supporting decision making that aligns with your family's values and long-term vision.
- ☒ **Communicate Openly and Effectively** – It creates a culture where every family member has a voice. Conversations become easier, more productive, and focused on solutions.
- ☒ **Protect Your Legacy** – The wisdom, traditions, and principles that define your family won't be lost. Instead, they'll be passed down through generations, ensuring continuity and stability.
- ☒ **Encourage Accountability** – Everyone knows their role and responsibilities. With clear guidelines, expectations are set, enabling a shared understanding and mutual respect.
- ☒ **Navigate Challenges Together** – Life throws unexpected challenges your way. With a Family Charter, you'll have a framework to navigate complex decisions, financial planning and generational transition.
- ☒ **Support Growth and Success** – A clear vision and shared goals help each family member grow—both personally and professionally—while ensuring the business and family, as a whole, moves forward together.
- ☒ **Live with Purpose** – Rather than reacting to life's circumstances, a Family Charter empowers your family to take control, plan intentionally, and build a future that truly reflects what matters most to your family.

Course Structure - 5 Step Family Transformation

	A 5 step Family Transformation
Module 1	Understanding the Importance of a Family Charter – Why it matters and how it shapes a family's future.
Module 2	Defining Family Values – Identify 5-7 core principles that guide your decisions.
Module 3	Crafting a Family Vision & Mission – Envision your family's future in 10, 20, and 50 years.
Module 4	Setting Family Goals & Guidelines – Develop SMART goals and structured family policies.
Module 5	Documenting & Revisiting the Family Charter – Ensure your Family Charter remains relevant and impactful.

Ready to future-proof your family's legacy?

This course is designed to empower families to progress at their own pace, providing them with the essential tools to explore key topics together. Peter is available to tailor a support package unique to your family, and happy to discuss further.

Contact Information

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Meetings and phone calls booked by appointment.