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Bridging Generations is an indispensable guidebook for those families.”-Neil Douthat, CPWA, Senior Vice President, Wealth Management UBS Financial Services Inc. As the baton of the family business and wealth is passed, millennials today find

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themselves stepping into larger, more complex organizations in a marketplace characterized by swiftly changing global forces.

## **Bridging Generations - Transitioning Family Wealth and**

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Most families fail to transfer their wealth onto their kids and heirs, Amy Castoro of The Williams Group explains. In today's Lifetime Income podcast, we interview Amy about her new book, Bridging Generations (buy on Amazon by clicking here), on why so many families have trouble and the steps that can be taken to help make that transition successful.

## **Amy Castoro on Bridging Generations: Transitioning Family ...**

By Amy A. Castoro, Roy O. Williams, ISBN: 9780998977317, Hardcover. Bulk books at wholesale prices. Free Shipping & Price Match Guarantee

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Family-owned businesses considering future transitions must establish trust and communication between family members and other participants in the business, said Amy Castoro, president and CEO of The Williams Group, a consultancy in San Clemente, Ca., and the author of, "Bridging Generations: Transitioning Family Wealth and Values for a Sustainable Legacy."

### **Preparing to Transition the Family Business to the Next**

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Amy Castoro is president and CEO of The Williams Group, a family coaching and consulting firm, and co-author of Bridging Generations: Transitioning Family Wealth and Values for a Sustainable Legacy.

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