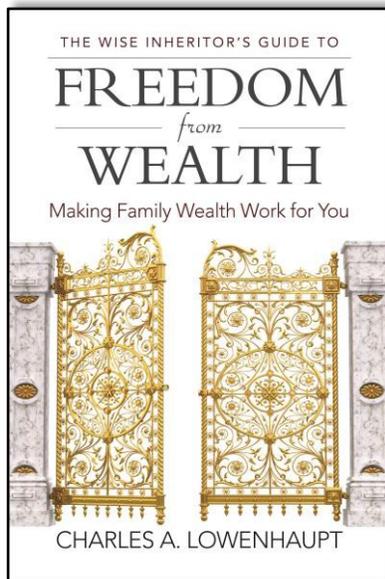


Wealth should never consume or imprison the wealth holder, but it can. This book provides solutions to the issues many wealth inheritors encounter, including problems with trust, family wealth secrets, and family legacy.



The Wise Inheritor's Guide to Freedom from Wealth

Making Family Wealth Work for You

Charles A. Lowenhaupt

Santa Barbara, CA, September 19, 2018—The next generation may witness one of the largest transfers of wealth in history. By one estimate, millennials and Generation Z are set to inherit \$30 trillion over the next 30 years.

The sudden inheritance of significant wealth creates a variety of challenges that seem counterintuitive and can be difficult to understand and deal with, making inheritors of wealth feel isolated from friends and colleagues. Meanwhile, the wealth industry is fed by revenue paid by wealth owners, not inheritors, causing misalignment of priorities and generational conflict.

The Wise Inheritor's Guide to Freedom from Wealth helps readers to put their new wealth in perspective, preparing them to lead inspired lives of self-actualization and freedom. As a third-generation wealth counselor and industry leader, Charles A. Lowenhaupt has helped wealth creators and inheritors to manage almost every imaginable challenge, including marital tension, family dysfunction, and addiction. Few people actually have the knowledge and experience to figure out the purpose of wealth and set it on its course. In this book, he helps wealth inheritors to develop a healthy relationship with wealth at a young age, thus enabling readers to live in harmony with both their wealth and their families.

What People Are Saying

"For those who have, or will be, inheriting great wealth, no wiser counsel or guidance can be found than Charles A. Lowenhaupt. By sharing a lifetime of stories and experiences, Lowenhaupt reveals the essential secret to leading a successful life for wealth inheritors. The secret? Being able to use your wealth as a tool in order to pursue and develop your true passion and calling. As you engage in this exciting journey, *The Wise Inheritor's Guide* will prove to be an invaluable companion along the way."

—**Mark R. Rank, Herbert S. Hadley Professor of Social Welfare, Washington University, St. Louis**

"This book is a must-read because the reader hears true voices of the wealthy and because Charles A. Lowenhaupt has been listening—for decades. His considerable wisdom will inspire inheritors and parents alike. 'Spoiled, entitled, unmotivated' are what we too often hear about wealthy inheritors. Imagine the possibilities when inheritors discover how to journey from entitlement to self-actualization."

—**Charlotte Beyer, Founder, Institute for Private Investors**

"We're all inheritors, and how we manage our inheritance is up to each one of us. This is a book of wisdom written by one of the world's great storytellers. Charles A. Lowenhaupt has a powerful way of providing readers with different approaches for dealing with life's challenges that often are accentuated by an inheritance."

—**Donald B. Trone, Cofounder and CEO, 3ethos**

"Charles A. Lowenhaupt weaves stories from his many decades of experience working with families of wealth and providing sage advice for inheritors, and their parents, to help them become masters of their wealth. By extending his notion of self-actualization and freedom from wealth to those who are to be the beneficiaries of the coming generational asset shift, he has captured the issues and the solutions that will be invaluable in that transition."

—**Timothy R. Barron, Chief Investment Officer, Segal Marco Investors**

"Charles A. Lowenhaupt has done it again, bringing us more strategies for freeing yourself from the burdens of wealth. This time around, he has added lots of stories about what could go wrong without thoughtful planning. The content is well worth the time, and the lessons learned the hard way are most insightful."

—**Sara Hamilton, Founder and CEO, Family Office Exchange**

"Charles A. Lowenhaupt is clearly a master story teller and rightfully a world-renowned family advisor with a genuine love of people."

—**J. A. Michael Hutchinson, Founder of The Hutchinson Consultancy**

"Leave it to Charles A. Lowenhaupt to directly address the hopes and fears of wealth inheritors. He has journeyed around the world asking the right questions and listening—really listening—to the stakeholders. Most importantly and empathetically, he has listened to the wealth

inheritors. Out of this journey comes amazing insight, helping inheritors in knowing the questions to ask and sharing the insights of many who have come before them. Although each family and situation are different, the shared experience of wealth inheritors comes to life in this book."

—Angelo Robles, Founder and Chairman, Family Office Association

Features

- Helps wealth inheritors to better manage the challenges that come with the significant wealth they have now or will receive in their lifetime
- Gives wealth inheritors the understanding and vocabulary to address wealth challenges and the capacity to openly communicate about them with parents, grandparents, and others
- Provides the wealth inheritor's parents and grandparents with an appreciation of the struggles many wealth inheritors face, ones that they may have forgotten themselves
- Identifies 10 specific challenges facing young, wealthy people today and advises them on how to deal with these challenges successfully

ABOUT THE AUTHOR

Charles A. Lowenhaupt is chairman and CEO of Lowenhaupt Global Advisors. A recognized industry leader in managing wealth for ultra-high net worth families around the world, he is also managing member of Lowenhaupt Global Advisor's affiliated firm, Lowenhaupt & Chasnoff, LLC, which was the first US law firm to concentrate in tax law and was established by Charles's grandfather in 1908. Lowenhaupt has a bachelor of arts degree (cum laude) from Harvard University. He also has a juris doctorate (Order of the Coif) from the University of Michigan Law School. Lowenhaupt is coauthor with Don Trone of *Freedom from Wealth*.

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Making Family Wealth Work for You*

By Charles A. Lowenhaupt

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