



Family
Business
Partnership.

Family Alignment Workshop

Is your family pulling in the same direction, or just holding the same assets?

Many family enterprises find themselves in a strange place. On paper, everything looks great. They are deemed successful, the business is doing well, structures are in place, advisers are busy drawing up plans.

Yet under the surface there can be:

- Different ideas about what the future should look like
- Rising tension between generations
- Lack of clarity over what governance is needed
- Unspoken worries about succession and fairness
- A sense that the business is driving the family, not the other way round

Most of the professional attention tends to focus on financial capital and legal and tax planning.

However, very little goes to the human, relational and spiritual capital, the elements that actually determine whether a family can thrive together over time.

The result is that families have plans or ownership structures that they feel they cannot live within.

Our Alignment Workshop aims to tackle these challenges and leave you with an increased sense of clarity and purpose behind your family business and other shared assets.





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The Invitation

A day to step back, realign and remember what wealth really means

The Family Alignment Day is a structured, honest workshop for families who want to align their purpose, ambitions and aspirations around their family enterprise. It is ideally suited to those who wish to treat wellbeing as a form of wealth, and who recognise that a thriving enterprise depends on a thriving family behind it.

This day gives you the time, space and expert facilitation to pause, reflect and understand one another more fully. Together, you will:

See clearly where you are aligned as a family, and where attention is needed.

Through the assessment and guided discussion, you gain a shared picture of your current reality.

Understand each person's strengths, hopes and aspirations, beyond their role or title.

This helps the family see itself as a group of individuals with legitimate needs, not simply a collection of responsibilities.

Talk openly about money, ownership and the future.

Topics that often feel sensitive or difficult become easier when held with neutrality and care.

Explore real-life scenarios to test how your current arrangements might play out.

You'll identify where your structures support you, where they stretch you, and where governance or communication may need to evolve.

Agree the next "act" in your family's play, rather than forcing a rigid plan.

The day introduces a more human, flexible way of thinking about the future that aligns with real life, rather than abstract ideal scenarios.

You'll leave with shared language, practical insight and a short list of aligned next steps, giving your family the clarity and confidence to continue its journey with purpose and cohesion.



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What the Day Covers

Tailored to your own assessment results and desired outcomes the day we spend together includes:

Assessment debrief

A clear picture of how aligned your family is on key areas, highlighting strengths and pressure points.

Character strengths and values

Using the VIA Character Strengths assessment, we help each person see how they contribute when they are at their best, and how that links to the family's culture and wellbeing.

Letters from your future selves

A powerful exercise where each person imagines life 10 years from now, if things go well. This unlocks aspiration, spiritual capital and a deeper sense of what fulfilment means for each of you.

Vision and purpose as a family

Drawing on those letters, we sketch a first draft of what wealth, wellbeing and success look like for your family as a whole.

Lifeboat Drills

Realistic scenarios such as death, incapacity or serious conflict, used to test how your current plans and relationships would actually cope. This is not theatre, it is a sober, constructive way to see risk and resilience.

Alignment and next steps

A structured conversation to identify what you want to protect, what you want to change, and the practical next steps that will support your long term flourishing.

Throughout the day we hold firmly to your shared ground rules, an agreed code of conduct and a culture of kindness and curiosity.



Outcomes

Families who undertake this workshop often describe it as the first time they have been able to see their situation clearly and collectively. The day does not force decisions; it creates the conditions for clarity, confidence and connection.

Families can expect to:

See a shared picture of their current reality.

By looking together at assessment results and the themes that surface in discussion, the family gains a clearer understanding of what is working well and what may need more attention.

Experience each other as people, not positions.

Through values, strengths and future-self exercises, family members begin to see one another with greater empathy and insight, which shifts the quality of dialogue and decision-making.

Give language to wellbeing and fulfilment.

The workshop connects financial success with the deeper elements of flourishing, helping families articulate what a good life and a healthy system mean for them.

Reduce anxiety about “what would happen if...”.

The Lifeboat Drills offer a structured way to explore how the family and its arrangements might respond to real-life events, highlighting where resilience is strong and where governance or communication may need strengthening.

Build trust in a safe, expertly held environment.

The day creates space for conversations that often feel difficult to start, allowing families to talk openly, listen fully and reconnect around shared intentions.

Move from unease to aligned next steps.

Families leave with a manageable plan built on clear priorities such as refining ownership purpose, improving communication, or developing the governance needed to support future decisions.

This day will not solve everything, but it is designed to be a powerful first act in a new play—one where wealth and wellbeing are consciously intertwined, and the family moves forward with greater alignment and confidence.



Practicalities and Next Steps

Who is it for?

This workshop is designed for families who share ownership or stewardship of a business or family assets, and who want to strengthen alignment around their future. It is particularly valuable where two or more generations are involved, or where ownership and decision-making responsibilities span siblings, cousins or branches of the family.

The day creates space for those who carry influence now, as well as those who will inherit responsibility in the years ahead. Whether participants are active in the business, involved in governance, or simply part of the wider ownership group, the workshop helps everyone see their role with greater clarity and confidence.

Most importantly, this workshop is for families who are willing to turn up with openness, curiosity and a genuine desire to listen to one another. If you are ready to explore what a fulfilled life and a flourishing future could look like for your family, this day provides a structured and supportive place to begin.

How many people can attend?

Attendance will vary from family to family, and we tailor the day to suit your circumstances. In most cases, the workshop works best with a focused group drawn from those who hold ownership responsibilities today, those who will hold them in the future, and any other family members who play a meaningful role in decision-making.

Whether your family is small or spans several branches, we can shape the session to ensure that everyone who needs to be part of the conversation is included and able to participate fully.

Where does it take place?

This workshop is most effective when delivered in person, ideally in a neutral setting that encourages openness and focus. We can discuss and agree a venue that suits your family's needs, whether in the UK or abroad.

If travel is required, families are asked to cover travel and accommodation, and we will work with you to keep arrangements straightforward.