



PASSAGES Issue Brief

EXPLORING KEY ISSUES IN FAMILY GIVING

Family Culture: Creating a Resilient Family Tree

Stories from the Forbes and Andrus Families

2018

IN THIS ISSUE

- 2 Authors' Reflections
- 4 Identification and Clarification
- 7 Organization and Governance
- 9 Fortify
- 12 Revisitation and Affirmation
- 14 About the Authors

Family connectedness, not money, has the greatest influence on multi-generational family continuity.

But when many think about legacy, it's often in the context of multi-generational financial wealth. Money, though, masks what people are really interested in passing to future generations of their family. Instead of being the primary focus, financial assets should be viewed as an enabler to the bigger objectives: HAPPINESS and COLLECTIVE CONNECTION.

Isn't that what we really want for ourselves and for our family?

But happiness and collective connection are intangible and can be very challenging goals to manage. So, rather than focusing on happiness when we think about our personal or family legacy, we put most of our attention on passing along financial wealth and hope that, due in part to whatever monetary boost we pass to our heirs, it will help them find happiness on their own.

Authors' Reflections

In our personal experiences working with families—and as members of two different families that have each maintained a collective identity through more than 275 years—we recognize some commonalities in our own families and other families that have achieved multi-generational cohesiveness. The observations reflected on these pages outline the core elements we believe are both relevant and critical for those seeking multi-generational continuity.

Multi-generational continuity is not a product of money. Rather, it's a product of family connection. Money, in and of itself, will not bind people together for more than a generation or two. Common identity, shared goals, an appreciation of shared core values, and experiences are what create durable family connections. Money can support these connections, but the assets themselves will not replace the hard work required to sustain family identity and connection.

Culture - It's Alive

The most important factor in maintaining multi-generational connections within your family is a focus on your family culture.

Your family's culture is a living, breathing entity that is reflected by individual and collective behaviors of family members. These behaviors are driven by individual and shared values, spiritual beliefs, economic and social norms, affiliations, experiences, geography, climate, and many other factors.

These common elements among family members create a sense of belonging, loyalty and pride that builds resilience. Family folklore, traditions and activities provide the socialization and cultural training for young family members, adopted children, step-children and in-laws. Your family culture is built, sustained and informed by each family member, your nuclear family, your extended family, the community where you live, and the broader society. And because aspects of your family's culture will shift over time, it's important to curate those shifts.

Focusing on your family culture doesn't guarantee your family will sustain a common identity and connection through generational transitions—past performance doesn't guarantee future returns. But we do know this: families that focus on culture are much more likely to sustain their connections—and their wealth—over time than families focusing exclusively on their money. Jay Hughes, renowned author and pioneer on issues of family wealth, outlines these cultural elements of sustaining family wealth, identifying them as the seven fundamental principles that guide his work.¹ Taken together, they frame the importance of family culture as a tool for sustaining families across generations.

Do The Work Now

This is important work, and it's becoming more important with each passing year. Why? The rate and pace of technology has changed expectations of how we work, communicate, and relate to each other. The world feels increasingly smaller as everything from cultural norms to fashion, music, toys and even jokes can be sent anywhere in the world in less than a second. In some ways this shrinking of the world creates more similarity, but it also creates an expectation and practically requires making constant tweaks as norms shift.

It used to be that family culture was more durable when it was rigid. "This is how we do it" makes things easier to control. And before technology blurred borders and cultural differences across the globe, there was less pressure to change and evolve. Today, though, it's unrealistic to shut off the torrent of pressure to change that comes from the external world. Rather than try to shut it out, identifying what's core to your family culture will help determine how to remain relevant while also protecting its foundational elements.

¹ Hughes, James E. Jr., *Family - The Compact Among Generations*, New York, Bloomberg Press, 2007, xvii

Family Culture Cycle

Our observations helped us clarify the process for identifying, solidifying and maintaining family culture:



We call this a cycle to recognize that culture is not static. To remain relevant, cultures must evolve and shift over time, and understanding when these shifts are necessary requires sensitive oversight and regular revisiting of each step.

The first step focuses on identifying and agreeing upon the building blocks of the family culture. The second step is designed to establish a system that supports the values and moral code of the family, and it identifies specific ways to socialize and reinforce the key elements that inform the family culture. Fortification refers to the specific activities you choose as a family to orient new members, engage and educate members at different points in life, and build relationships both among and between the different generations. Finally, the re-visitation and affirmation step focuses on stewarding family culture and requires connections across all generations. The family council (see page 7) is responsible for revisiting and affirming the family culture to ensure it remains relevant within the family and also for identifying if/when external counsel may be needed.

Each of these steps in the process are outlined in more detail in the following sections, providing a framework for those who recognize the value in managing and nurturing not just your financial assets but also your human assets.

In the interest of learning and improving on our thinking, we encourage you to share your own experiences and challenge or question the framework. Focusing on this process will support those of you who aspire to create a durable family legacy that sustains both your family members and your financial assets.

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Identification and Clarification — The Foundational Building Blocks

The “Family Culture Cycle,” is a fluid, living, ongoing process that, with careful nurturing and management, helps strengthen family connectedness and cohesion. By building a process that invites participation, families create a sense of ownership and identity. This connection results in a deep commitment to shared family connections and support systems. If taken for granted, these critical connections and support systems will fray at the edges and disconnect the family over time; that’s an outcome we all want to avoid.



Like In Nature, Families Thrive On Interdependent Systems and Connections

Identification

There are a few key areas to focus on as you identify the culture of your family. At the center of this effort is a unified understanding of the family’s shared core values. These shared core values directly inform how culture is expressed and include clues for how to nurture it.

To be clear, having shared core family values does not mean that all family members have the same individual values. Family members will each have their own values, which can be separate and distinct from those you share as a family. Shared core values refer to the collectively held values that inform how you interact and behave together. And while individual values may be hidden from view, shared

core values are typically identified and reinforced by rules and behaviors.

We will illustrate this step in the context of the family foundation.

Consider:

What are some of your family’s core values and where did they come from? Are there stories you grew up with or have recently created that reinforce these values? Have these values been woven into the fabric of the foundation (or fund) and how it operates?

Kelly’s family foundation, [Surdna](#), celebrated its 100th anniversary last year. Much has been examined about this philanthropic legacy and its founder. As a member of the fifth generation in her family, Kelly never met her great, great grandfather, but she has nevertheless spent hours learning about this man, where he came from, what he cared about and how he “showed up” in the world.

Kelly reflects:

“What is fascinating is that many of my great, great grandfather’s core values have been present over the 100 years of his philanthropic legacy. Take humility, for example. Our founder, John Andrus, was born into very modest means on a rural farm in New York. From a very young age, he found entrepreneurial ways to earn money for his family and understood the true meaning of hard work and thrift. When he amassed his fortune later in life, he remained humble, understanding where he had come from and how difficult it was to change his family’s economic path. This humility is evident when he established the family foundation in 1917 and reversed the name Andrus to Surdna. He wanted the foundation’s focus and reputation to be on the work rather than on the family name.”

Humility has been a shared core value of the institution for 100 years and shows up in how staff and board approach the work. Both staff and board consider Surdna to be a 'learning organization.' While we have accomplished a lot and learned much from our work, we also recognize that we don't have all the answers. We are committed to listening and nurturing deep partnerships in the communities we serve. We attempt to diffuse power dynamics both internally between board and staff, and externally with our nonprofit partners, which has resulted in more transparent conversations around failure and the ability to be nimble in our approach to grantmaking. By identifying humility as a core value, we seek to be intentional about embedding this value into the culture of the institution."



Shared core values refer to the collectively held values that inform how you interact and behave together. And while individual values may be hidden from view, shared core values are typically identified and reinforced by rules and behaviors.

Naming the shared core values of your family and/or family foundation enables you to look at how they come to life in day-to-day interactions. As an example, for those foundations with an office and/or full-time staff, the **physical space** can either support or conflict with values such as collaboration. Look around your family foundation office. How is it laid out? Are there open spaces for collaboration or are there more doors and walls for privacy? The physical environment has a lot to do with how culture plays out. If a shared core value of your family is collaboration, then having office space that hinders this may need to be re-imagined. If the physical space has limits in terms of what can be changed, or if you do not have an office or dedicated staff, then think of other ways to nurture culture and connection for those who are stewarding the philanthropy. Making time for gatherings, regular communications, creating a photo wall, finding space outside to reflect or take a break, utilizing video technology...these and other efforts can begin to “break down” the physical walls that may counter efforts to create a healthy culture in the organization.

Leadership is another area where shared core values play out. In the context of a family foundation, consider who is **leading**



the institution and who are the other key leaders on staff. You may have a family member in charge or have hired an outside staff person. How does she set the tone for a healthy culture that embraces the core values of the family and its founder? Does s/he make him/herself accessible and empower others to lead? Does this person embrace the shared family values and take the time needed to embed these in the organization? Does s/he support and nurture board-staff relationships that are authentic and build trust?

If nurturing culture in your foundation is important, then hiring leaders who make this a priority is critical. It's not easy to make time for culture building with the day-to-day pace and workload but ignoring this may have negative and lasting results. Some leaders don't possess the skills to tend to culture so look at professional development opportunities and even other leaders in the family who may provide ideas and inspiration.

Clarification

Physical space and leadership are just two aspects of an organization that either reinforce values and support family culture or in some cases, work against it. Taking time to assess these details with humility and self-awareness enables families to minimize where there may be conflict between values as they are stated and values as they are expressed. The Clarification process can help in minimizing these areas of potential conflict and ultimately strengthen family culture.

Clarification helps identify and confirm **who** is part of your family's culture and ensure their voices are heard as you further shape and nurture it. Just because a few key people have identified core values and aspects of the family culture, doesn't mean that there will be universal alignment. It is critical to consider everyone's lived experience in an effort to bring in multi-generational views. Depending on your family's size, surveys and one-on-one conversations can be efficient ways to include different perspectives as you clarify culture because the perception of the family's shared values is often different between generations. Yet, gathering these stories and insights can often provide a real sense of clarity about what unifies people.

You will likely discover common threads over generations that may have been inspired by the founder. Going through an open, transparent and equitable process to gather these insights can ground families in who they are and how they connect. It can inspire new connections that weren't apparent and open people's minds to shifts that may be needed. Remember to ask each person how they define a "healthy culture" and what ideas they have to create an environment that embraces this. It's not only about reflection, but also vision and innovation.

Being intentional about identifying and *clarifying* your family's culture before you begin to build structures and rituals is a key phase in the "Family Culture Cycle" that should not be assumed or overlooked. You might even find that this process alone can begin to surface or reinforce connections among family and staff that lends itself well to future efforts.

Organization and Governance — Building the Guard Rails

The tricky thing about managing families is that members are prone to creating rules but issuing no rule book. The rules are unwritten, but you're expected to know them. These rules are often based on deep-seated values. And because these rules are never written down, they're taught by a combination of modeled behaviors and reinforcing or corrective comments. Families may be able to get away without governance practices for a generation or two. Beyond that, this unwritten rule book begins to look different for each branch of the family, chipping away at and watering down the shared values that once felt like bedrock. That's where governance comes in.

Unlike the unwritten rules, governance is an intentional system of processes, activities and guidelines for decision-making that families design to sustain their shared core values.

In its most simple form, governance is made up of three elements:

- **The Family Constitution** — a document that identifies the vision, values, and expectations for family members
- **Family Meetings** — gatherings where family members are invited to learn about things that are relevant to the family
- **Family Council** — a subcommittee tasked with management and maintaining the family “rule book” — and often charged with supporting family members’ human and intellectual capital

Every family has their list of rules (written or not). The Forbes family shares a piece of property that eight generations have enjoyed. Below are some of their unwritten rules. And as a side note, since these “rules” are not written, they are open to debate and interpretation:

- **No Flashlights** — Using a flashlight at night risks blowing your cover and exposing you as a friend and guest rather than a relative. One’s ability to navigate footpaths at night solely by feeling the contours of the path with their bare feet generates respect.
- **Know the Roads** — Family members who memorize the names and intersections of all the footpaths and roads crossing the property gain even more respect.
- **Care for the property** — And family members who efficiently wield a chainsaw or pair of loppers are celebrated as respected stewards of the property we love so much.



Why are these behaviors important? In the examples above, they are based on the underlying belief that to keep this cherished family property, it’s important to feel, learn, and appreciate the land’s contours, know the topography, its flora and fauna and how to care for all of it. These behaviors and the unwritten rules that drive them are based on “respect”, “appreciation” and “collaboration” — all of which are core family values.

These values also play out in other behaviors and traditions. When guests arrive, everyone is expected to help haul their gear to the house and

help them get settled. Young family members learn at an early age how they are related to one another, learning the difference between a first and second cousin versus one who is once removed (born in a different generation).

While foreign and even alienating to those who are not related by blood, this exercise helps family members recognize, respect, and appreciate the multi-generational connections and history we share. We collaborate on projects such as installing a solar array to reduce our costs and carbon footprint; we maintain the roads and paths; and we celebrate these connections and honor the ability to collaborate when we gather, as we have for generations, to make music together.



Building a Solar Array- A Family Project

In the Forbes family, there is a council, and there are annual meetings. But there is no written Family Constitution. The culture of the shared property, instead, provides a tangible place to gather and a reminder of the vision and values that would otherwise be expressed in a constitution.

While not a complete expression of solid governance practices, this system works because there are traditions and expectations that fortify the culture and provide opportunities to revisit and affirm the values that support it.

As families expand, and the broader culture continues to evolve outside a nuclear family culture, it becomes more important to establish and maintain governance. And for families who operate businesses together, establishing strong working governance practices is essential.

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Fortify – Institutionalizing Connectedness

With the previous parts of the process completed, it can feel like the work is done: your family has defined its shared beliefs and clarified its culture. Yet, this is often where the elephant can wander into the room and erode all that hard work. Without fortifying these cultural pillars, mindsets and behaviors can shift away – sometimes even subconsciously – from what has defined and guided your family.

Think of family culture like creating a garden. You identify the location, prepare the earth and plant the seeds. But the garden must also be nourished and protected from both internal and external forces by weeding and pest protection to ensure a healthy crop. Cultural fortification is the nourishing, weeding, and protection of your “family culture garden.”

Fortifying your family culture requires regular care by revisiting and reaffirming core shared values, tending to traditions, and providing opportunities to learn, connect, and support during transitions. Consider the following examples of how family culture is reinforced and fortified through specific family activities.

Socialization



Singing from the Family Songbook

In the Forbes family there are various activities and traditions that reinforce the cultural values of connection, cooperation, and stewardship. “Music has long been part of my family tradition. We gather regularly at different family homes during the summer to make music, literally choosing songs from the family songbook. Some of the music is fun for all ages, and other music is more complex and includes multi-part harmonies or rounds. These gatherings celebrate our musical traditions, while also reinforcing subtle cues about the importance of working together.”

In the context of family philanthropy, consider moments when new family members are brought onto a Board. How do you integrate these new members? This socialization process is important. At the Surdna Foundation, there is a Board orientation process that includes new members spending a day learning about the story of the founder and the family’s 100-year philanthropic legacy. They meet with Surdna staff and learn about the different program areas. They visit the *Andrus Children’s Center*, a residential treatment center for kids and *Andrus on Hudson*, a retirement home in Yonkers, NY, both of which are a significant part of the family legacy. New board members are also assigned a “board buddy” with some tenure to help with their integration onto the team. These approaches to learning – storytelling, information-gathering and mentoring – are designed to convey the values, beliefs and identity of the family foundation, which fortifies the overall culture.

Finally, consider how you educate family members about the values, beliefs, and approaches to giving that make up your family’s culture. To nurture and fortify culture in multigenerational families it’s important to allow everyone to find their own identity in the fabric of the larger family. Welcoming diverse viewpoints and approaches can ultimately enhance the existing culture and strengthen efforts to engage the next generation.

Connecting With Your Tribe

Talking about your family's culture is one thing, but to truly inspire and embed this learning requires building connection. Connection can occur in a number of ways including through storytelling or shared experiences that strengthen relationships.

How do you share stories in your family? Do the stories from the past connect the threads of your philanthropic values? Do they surface where the shared core values and beliefs are rooted?

In families that connect across more than two generations, some tell their stories through publications or biographies, that include timelines, family trees, artwork, and artifacts. For example, the Emily Hall Tremaine Foundation uses an online platform called [Enwoven](#) to tell the story of their founder and the creation of the family foundation. The site includes hundreds of images of artwork collected, with the expectation that this platform will continue to catalog family treasures as new items are added. They recognize that stories aren't finite but that they continue to evolve and expand, providing access for the extended family to learn about both the past and the present.

Traveling with family can also build deeper connections with one another and help to fortify culture. Think about the travels you may have experienced with your family. The spaces and experiences we create with each other build connection. These connections put the entire family on the same level because often the experiences are new for everyone. This allows members to learn from each other while also creating memories that can be revisited—some even becoming part of family lore.

The Forbes family has a tradition designed to create connection on their shared family property. It's called *Work Week*. More than twenty cousins between the ages of 13 and 16 live together in the same house for a week doing jobs to help maintain the property (yes, there is adult supervision!). As important as the labor, the kids bond with their cousins, learn about family history, and discuss how they are related to each other. And they get a chance to explore the land together. This orientation also helps create a sense of both individual and collective accountability for stewarding the property for themselves and for future generations.



Work Week Teens

Talking about your family's culture is one thing, but to truly inspire and embed this learning requires building connection. Connection can occur in a number of ways including through storytelling or shared experiences that strengthen relationships.

There are other activities that are no longer done but have become part of the family lore. Jamie recalls, “My generation grew up hearing about the annual sheep drives that required ‘all hands’ to form a continuous human chain that physically drove the flock of several hundred sheep into pens. Back in that era, kids grew up looking forward to the day they were old enough to participate, and those unable to make the physical trip would hold other logistical jobs to support the effort. Even though the flock of sheep is smaller and managed differently today, these stories of the sheep drives convey the family ethic of working together to manage and care for the property. Our reverence for the land and the connection it creates for all of us means that our individual needs are not as important as the needs of the community. It’s a pretty powerful concept that we reinforce—even by talking about some of the activities we no longer do.”

Consistency - Even Through Change

Life is filled with transitions. We move to a new location, attend a new school, change jobs, get married, and have children and adopt them. There are divorces and remarriages, creating new family structures. The list goes on and on. These transitions play a part in how families show up in their giving. How do we move through change at different paces but stay connected? How do we not let personal transitions get in the way of a family culture focused on service and philanthropy? A great example of tending to transitions was experienced by Kelly during her board service on the Andrus Family Fund.

Kelly explains, “The Andrus Family Fund is a sub-fund of the Surdna Foundation, launched in

2000 to engage fifth generation family members in more strategic and formalized philanthropy. I was a founding board member with seven other cousins I had never met before. We spent a great deal of time paying attention to transitions—both internally and in how we approached our work. This had a significant impact on fortifying a healthy culture. We created an officer position called the ‘Transitions Keeper’ and made time at every board meeting to have personal check ins, mark moments and honor transitions. We planted a tree in the Andrus Children’s Center’s apple orchard each time a new family member joined the board. We honored our family board member who passed away unexpectedly by placing her favorite roses at the table at every board meeting for a year and taking a moment of silence to honor her. Ultimately, we took time to honor ourselves, each other, our grantees and our beneficiaries by recognizing and tending to transitional moments. This strengthened both our culture and the relationships we had with our grantee partners which I believe made us more effective in our work.”

Fortifying culture in families takes time, effort and regular attention. Simply identifying cultural values and creating structures to embed culture isn’t enough. Building opportunities to learn about the family history, share in new experiences, welcome diverse viewpoints, create connection and tend to transitions is hard work, but it’s work worth doing. Think about the subtle and intentional ways you may fortify your family culture. These approaches will be unique to each family and help clarify how families work together and support each other, whether in their personal lives, businesses or in their philanthropy. Cultures that are tended to are more durable and more likely to endure over time.



Revisitation and Affirmation — Keeping It Relevant

The landscape of family culture is subject to constant pressure from outside as the world we live in changes. This is true regardless of the size of your family or the number of generations that you track in your past. In that context, how do you hold onto core shared values that inform your family culture when the ground is constantly shifting beneath your feet? And how do you know what's OK to shift or tweak and what is part of the bedrock of your family identity and common connection?

This takes a combination of clarity and intuition and requires regularly revisiting these shifts over time. Families must be clear about how to evolve with external pressure while remaining true to their bedrock values. It may be one person or perhaps a group who become keepers of your family's core cultural values. In the context of multiple generations, there may be a more formal council, Board or committee that is charged with, among other things, protecting the family culture.

These cultural gatekeepers are responsible for striking a balance between resisting any change (because change, of course, is inherently filled with the unknown) and identifying what changes make sense so that your family's cultural identity remains strong for all members regardless of age. Resisting change for the sake of maintaining tradition can feel like protecting the family culture. But preventing change also creates risk: resisting all change will erode your family's cultural identity, particularly among younger generations who lack the context from the past and are highly tuned into remaining relevant. Defining what aspects of your family culture must remain and what can shift is the work of those responsible for stewarding your family culture. And, of course, even with cultural gatekeepers focusing on family culture, some change is inevitable.

The Forbes family has several different groups of family members who nurture family culture by recognizing history and tradition while also maintaining cultural relevance. Some of these activities are formal committees while others may have begun as a small project and have evolved over time. Two examples of how this comes to life are in our family tree project and in our approach to technology upgrades.

These cultural gatekeepers are responsible for striking a balance between resisting any change (because change, of course, is inherently filled with the unknown) and identifying what changes make sense so that your family's cultural identity remains strong for all members regardless of age.

“About 40 years ago, one cousin took it upon herself to create a large-scale family tree using the second floor of a barn. Little note cards identified family members, with each branch of the family assigned a color, and each card connected by yarn. The project grew and evolved with each year, and now with tape replacing the yarn, we also have printed books, electronic versions of the very analog card-based ‘tree’ in the barn and even different exhibits that display art and artifacts from various family members. Despite the different changes to the space and options for accessing the genealogy info, the original card-based version remains, and it is a regular destination for those looking to discover and explain how we’re related and to celebrate our collective history.

In a family that cherishes tradition, rapidly evolving technology creates many challenges, and the changes we have made in the face of available technology are always carefully considered. Most change has been focused around practical management realities, and what many outside our family would consider an upgrade or update is typically shunned or simply declined.

So, you can imagine the debates that occur around the question of whether to invest in high speed internet for the property. The prevailing wisdom has been that ‘we come here to get away from all that.’ Broadband speeds mean people can hole up in their room binge-watching the latest season of *Game of Thrones* instead of playing cards, joining a game of charades, swimming or exploring. Changes brought about from rapidly evolving technology can feel like a direct threat to how we spend time together.”

When Kelly’s family foundation, Surdna, established its first next generation program in 2000, they did not mandate how the program should be defined. The fourth generation of the Surdna Board empowered those fifth-generation family members to build the governance structures, program areas, and yes, the culture, of the program. The Andrus Family Fund, known nationally for its work in foster care and juvenile justice, tended to culture from the beginning, creating an officer position called the “Transitions Keeper.” The founding board members of the Andrus Family Fund applied a transitions framework in the approach to their work. This framework taught them the importance in marking moments, in understanding how we all respond to change in different ways and at different paces.

In the face of tradition, these questions can either feel obvious, or they can ignite controversy because tradition lies at the heart of the matter. And the fear is that changing traditions may begin to unravel the connections that bind you together as a family. This is why it’s important to be thoughtful and strategic about how to sustain the shared core values in your family culture, while also recognizing that how they are interpreted may require occasional shifts to remain relevant. Cultural gatekeepers ensure that families sustain their collective identity and sense of connectedness over time by watching over and revisiting their cultural norms, adjusting or confirming along the way that “this is how we do it” while also recognizing that how we do it today might have to be different next year.



Conclusion — The Cycle Continues

Family culture, like the individuals within a family, is a complex, living, breathing system that we believe is at the heart of family connectedness. When family members recognize the power that comes from establishing and maintaining a collective set of core values that can sustain and nurture both individuals and the collective group, it becomes clear to everyone why the work is important—and worthwhile.

Keep in mind that these principles are relevant to all families, and they should be adjusted according to the size and scope that works for you. If you are starting from scratch, the process can feel overwhelming. This should be an iterative process—and it’s a process that requires participation from other family members. The process itself is designed to engage others and provide opportunities to get family members involved at different times, according to what interests them. And while it’s important work, it can be fun.

About the Authors



Jamie Forbes is a member of the sixth generation in a family with a history steeped in shipping, transportation and communications dating from the 19th Century. He is the Founding

Partner of Forbes Legacy Advisors, which specializes in preparing families for generational transitions and expressing their values and passions through their giving. Read his bio [here](#).



Kelly Nowlin is a fifth generation family trustee of the [Surdna Foundation](#)—a 100-year-old family foundation—and is also the Founder and Principal of KDN Philanthropy Consulting,

helping family foundations mark milestones, engage the next generation and realize both legacy and impact in their work. [Click here](#) for more info on Kelly.

About the National Center for Family Philanthropy

The National Center for Family Philanthropy (NCFP) is the only national nonprofit dedicated exclusively to families who give and those who work with them. We provide the resources, expertise and support families need to transform their values into effective giving that makes a lasting impact on the communities they serve. Together, we make great things happen.

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We offer special thanks to our Leadership Circle members and to Friends of the Family, our annual contributors who make it possible for NCFP to produce important content for the field. We also express our deep gratitude to the family foundations that agreed to share their stories in this paper. For information about becoming a Friend of the Family, email ncfp@ncfp.org or call 202.293.3424.

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