

## Next Chapter Edition

Developed by organizational psychologists, consultants and seasoned coaches, this program prepares today's leaders for their next chapter. It helps them define their post-transition goals and identity, fundamental elements of a successful intergenerational transition.

The program guides participants through a transformative journey of learning, self-discovery and co-development. By integrating technical skills, collaborative learning and well-being, participants define their own meaningful path within the family legacy, based on clarity, confidence and connection to self.

It offers a structured space for reflection to explore the strategic, emotional, identity and legacy dimensions of transition, helping to answer the essential questions: Where am I today? and Where do I see myself - with what intention, meaning and impact?


### PROGRAM OBJECTIVES


- Assess your current personal position within your family enterprise and define your upcoming life chapter.
- Discover and articulate a renewed sense of purpose, meaning, and legacy for your next chapter.
- Develop a clear, actionable roadmap with milestones for a successful transition.
- Build strategies to maintain health, well-being, and personal fulfillment throughout the transition.
- Integrate your vision and commit to your plan by effectively communicating it and gaining support.
- Identify family governance mechanisms to ensure a harmonious and supportive transition.
- Create detailed strategies and tactics to achieve critical milestones in your transition journey.
- Establish financial and non-financial goals, identify trusted advisors, and finalize your comprehensive Next Chapter - Transition Plan.


### FOR WHOM


This program is designed for entrepreneurs, family business leaders, and family members who are beginning to reflect on the next phase of their personal and professional lives—whether they have already stepped back from daily operations, are preparing for succession, or are simply seeking clarity and purpose in what comes next.


### WHAT SETS THIS PROGRAM APART


 *Ongoing personal development opportunities throughout and post-program.*

 *Access to globally recognized coaches, facilitators and thought leaders.*

 *Total wellness approach—mental, emotional, and relational.*

 *Depth over surface—tackling familiar topics in a more meaningful way.*

 *Space for deeper conversations and personal reflection among a community of peers.*

 *Live case studies that bring lessons to life.*

## DELIVERY FORMAT

	What	Duration	When
WORKSHOPS	8 monthly in-person sessions	1 full day (6 hours)	Dates to be determined
COACHING	4+ one-on-one coaching sessions	1 hour each	Dates to be determined

## PROGRAM CONTENT OVERVIEW

### Module 1: Introduction and Foundations

This module helps you assess your current situation within your business family and personal life cycles. You will explore the psychological paradoxes of identity transitions and identify key factors, catalysts, or challenges of your upcoming transition.

### Module 2: Sense of Purpose and Meaning

This module helps you discover your purpose and future interests. You will use tools to clarify your objectives and navigate potential difficulties, developing a personal intention statement and defining the goals of your next chapter.

### Module 3: Transition Plan

This module helps you translate your vision into a tangible roadmap. You will identify key pillars and milestones, developing a high-level transition plan to transform your intentions into concrete actions.

### Module 4: Health, Well-Being and Fulfillment

This module helps you explore how to positively experience your transition to protect your future well-being. You will develop tools to redefine personal fulfillment and manage impacts on your overall health and discover the *WellnessFlow* profile to deepen your self-knowledge.

### Module 5: Communication and Integration

This module focuses on strategic communication: what, when, and with whom to share your vision to build bridges and gain support. You will consolidate and share your reflections in an initial plan and explore external success factors.

### Module 6: Family Governance

This module explores how governance can support your upcoming needs, challenges, and paradoxes. You will identify governance mechanisms, practices, or policies to anticipate or revise future needs and ensure a harmonious transition.

### Module 7: Transition Strategies and Tactics

This module enables you to target specific financial and non-financial strategies to design for supporting a successful transition. You will determine success factors to overcome difficulties, define a precise timeline, and finalize role evolution in connection with your plan.

### Module 8: Support Network and Conclusion

This module enables you to identify your support needs from trusted advisors to achieve your financial and non-financial objectives. You will conclude with a final presentation of your transition plan and receive constructive feedback on your plan.

## INVESTMENT

\$16,000 per person

Including materials, food and beverages during the in-person sessions