FACULTY

Engaging & Retaining Heir Families™ Training

Institute for Preparing Heirs™
www.preparingheirs.com

VIC PREISSER

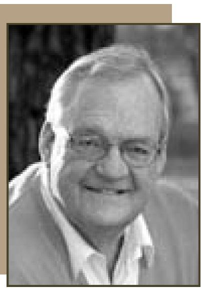
Founding Director,
Institute for Preparing Heirs™

Vic Preisser brings 40 years of business and government experience to The Institute, focusing upon the development of career paths for family members/ heirs. With eight companies where he served as CEO or Senior Management, two state level cabinet appointments, and three businesses within his own family, Vic brings a breadth of practical experience that has proven essential to family coaching.

Co-author of the books *Preparing Heirs, Philanthropy, Heirs & Values* and *Estate Planning for Post-Transition Success*, Vic's specialty within The Williams Group is coaching and mentoring heirs on career choices, assisting heirs as they learn to fill those roles, and training institutions to work with their high-net-worth clients on wealth transfer issues.

With three years service in the US Army, Vic holds BS (summa cum laude) and MBA degrees, both from Stanford University.

ROY WILLIAMS



Founder, The Williams Group
Founding Director, Institute for Preparing Heirs™

Roy Williams is the acknowledged Dean of Post-Transition research and planning. He is a pioneer in the art of assisting high net worth families to meet the challenges of transferring wealth from one generation to the next.

Roy is the author or co-author of five highly acclaimed books on wealth transition-related topics. Also in 1994, in conjunction with Professor Michael Morris of the Miami of Ohio School of Business, Roy completed the largest research project to date on family wealth transfers, studying 3,250 families to determine why only 1/3 of the families succeeded in retaining their wealth and family harmony into the next generation.

One of seven children, Roy joined the Navy, serving as a Marine corpsman (Medic). After starting his own family during college, he gave up his dream of becoming a doctor and graduated from the University of the Pacific in 1963. He played tackle for the San Francisco 49ers until a serious injury forced him to retire from football.

ROBERT KENNY

Ed.D., Boston College
Center on Wealth and Philanthropy

Bob Kenny is the Associate Director of the Boston College Center on Wealth and Philanthropy with thirty years of practical and research experience in developmental, counseling and educational psychology. With a distinct combination of skills and expertise, Bob listens with the ear of a therapist and sees the future through the eyes of an educator. Through his work at the **North Bridge Advisory Group** and as the Executive Director of *More Than Money*, Bob came to understand the complex emotional quandaries and interpersonal dilemmas faced by parents and children in high-net-worth households. He formulates and implements developmentally appropriate strategies to address the unique challenges found in affluent families and settings.

As the field director for the research recently conducted at Boston College and funded by the Bill and Melinda Gates Foundation, Bob focused on the joys, dilemmas and aspirations of individuals from high-net-worth households. Current research projects at the Boston College Family Wealth Impact Project include identifying the characteristics of psychologically healthy high-net-worth families.

A former Associate in Education at the Harvard Center for Moral Education, Bob earned his doctorate in Counseling Psychology from Boston University. In addition to his experience teaching and lecturing, Bob was an unusually effective clinician for young adults with addictions. Throughout his career Bob has centered on how values-based decision-making changes over the developmental life span.

KAREN WEISGERBER

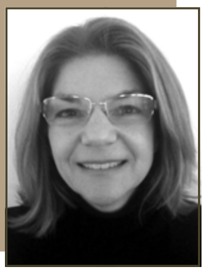
Ed.D., Boston College
Center on Wealth and Philanthropy

Karen is a Senior Advisor at the Boston College Center on Wealth and Philanthropy and a partner at the North Bridge Advisory Group. She brings an expertise with inheritors that has developed over 20 years as a licensed psychologist in private practice, along with consulting, research, and teaching. Karen's consulting practice engages individuals, couples and families around the multi-faceted issues that present themselves with the distribution of wealth among siblings and across generations. She also consults with financial and legal professionals seeking to deepen the services they provide to high net worth families.

In her role as Senior Advisor at the Boston Center on Wealth and Philanthropy Karen is an active participant in the Family Wealth Impact Project, currently investigating the risk factors of inherited wealth. She was the principle interviewer for a Templeton Foundation Wisdom and Wealth project researching the field of wealth advising. Prior to joining the Center on Wealth and Philanthropy, Karen served on the faculty of Boston College for 18 years, teaching graduate students in the department of Counseling, Developmental Psychology and Research Methods. She is on the faculty of the Psychoanalytic Institute of New England, East.

Karen completed her Ph.D. at Boston College and clinical training with Harvard Medical School, where she was also an instructor and clinical supervisor. Karen has authored numerous papers, published articles, and

CAROL SHERMAN



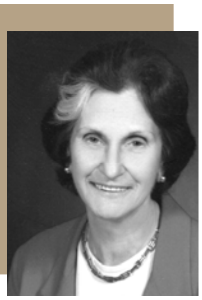
Director of Marketing,
Institute for Preparing Heirs™

Carol brings more than two decades of experience as a results-driven marketer with strong writing, communications, creative, and strategic planning skills.

Prior to joining the Institute for Preparing Heirs,™ she served as Marketing Director for one of the nation's largest independent mortgage lenders where she utilized her team building skills to successfully lead business development and marketing functions for one of the bank's most profitable divisions. Carol was responsible for driving Internet and web-based strategies, retention/referral programs, market share growth, and brand strategy. She oversaw a multi-million dollar annual performance-based marketing budget, negotiated marketing agreements with third-party providers, and managed a staff of marketers and business development managers.

In addition, she has authored numerous magazine articles primarily on topics of interest to the legal community, and most recently published her first fiction novel.

JUDY BEATRICE



Board of Directors,
Institute for Preparing Heirs™

Judy Beatrice has spent over 25 years in teaching and training, including 18 years at Smith Barney. Her commitment to personal competency and professional development has created a demand for her role as a facilitator, presenter, and mentor for financial advisors and senior managers. As an original member of the Professional Development Group (PDG) at Smith Barney, she assisted in the design, development and delivery of programs for financial advisors, staff, regional technology trainers, field service personnel, regional administrative officers, regional directors, branch managers, and clients. Judy has taught financial planning courses at Suffolk University, Bentley University, and Regis College.

Ms. Beatrice is a CPBA/CPVA - Certified Professional Behavioral and Values Analyst. Her work with teams, managers, and clients enable them to understand the effects of behavior on relationships and decision making in their personal and professional lives. Ms. Beatrice is also certified at the advanced level by Psychological Associates for the delivery of the Leadership through People Skills Program and completed her ASTD Training Certificate Program May 2006.

DR. PETER YAHOLKOVSKY

Family Coach,
LifeScape, LLC

Peter is a senior family coach with LifeScape, LLC. He brings two decades of experience to his commitment-based coaching perspective. As a highly skilled and credited group leader in corporate management consulting, Peter also coaches senior executives of Fortune 100 companies with respect to their leadership and communication skills.

He also works with families in a group setting, as well as with individuals to master the foundations of communication that builds authentic trust. Peter is certified as a Master Somatic Coach by the Strozzi Institute, an organization dedicated to training advanced coaching in unifying mind and body. As a prelude to his coaching career over the past two decades, Dr. Yaholkovsky practiced internal medicine as a Board Certified Internist after graduation from Stanford and UC Davis.

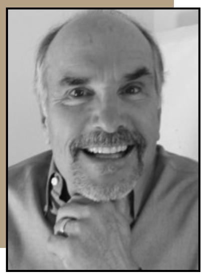
SUE STAKER

Family Coach,
LifeScape, LLC

Sue is dedicated to creating independence and sustainability in her clients by developing their competence to intentionally strengthen relationships, build authentic trust, and coordinate effectively together. Sue's coaching practice spans working with individuals to move their personal and business goals from vision to successful action, to working with leadership teams and executives in the design, implementation and leadership of organizational change. Her clients include sole proprietors, small founder-led firms and global public corporations — across diverse personal, family and business situations.

Sue has over 20 years experience in business, including 10 years as a consultant to leadership teams and founders of a wide range of businesses. A Canadian citizen, who has lived in Calgary and Vancouver, Sue has an international perspective on the obstacles heirs face as they mature and grow into responsible beneficiaries. A former instructor at the Southern Alberta Institute of Technologies, she is a certified Somatic Coach and has also received training from Business Design Associates, and the Leadership Institute of Seattle.

JOEL KIMMEL

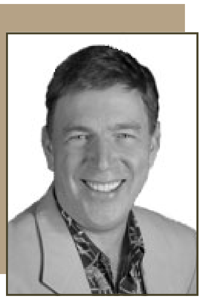


Family Coach,
Kimmel & Company

Joel Kimmel has focused his career on building families, teams and organizations grounded in efficient, powerful, and effective communication technology. Joel's coaching has encompassed a broad spectrum of life, from corporate executives to outreach programs for inner city youth. His promise to his clients is that they experience the benefit of individual creativity, an intimate sense of community, and a personal commitment to building honest and authentic relationships in their lives. He has extensive experience leading corporate trainings; consulting on problem solving, team intervention, and coaching individuals on personal performance and authentic action. He continues his inquiry into "the power of language," "the technology of speaking" and their relationship to personal and business leadership.

His consulting has included start-ups and long-term management of successful small businesses, franchises and international organizations. One of the pivotal shifts in his career was working with Dr. Fernando Flores, former Chilean Minister of Finance while he was designing and the "Communication for Action" technology now used worldwide in the transformation of business.

DAN HAYGEMAN



Family Coach,
ConverseNet, Inc.

Dan has taught formal courses at the undergraduate level as well as training graduate students in family therapy. He focuses upon the critical skills for discovering client needs, and from that creating agreements leading to system-wide change. He has presented coaching and training in team and personal effectiveness to a broad spectrum of individuals and numerous corporate teams from Capital One, AT&T, Niagara Mohawk, James River Corporation, Allianz Insurance, Westinghouse, the Boeing Company and Ivex.

Because his sales coaching work represents new technology and requires commitment throughout an organization to be successful, he has developed sensitivity to the wide range of concerns and needs which must be addressed to successfully alter communication habits in corporations.

Dan has managed a wide range of projects, from complex consulting assignments and special events to the creation of a strategic information plan for a state-wide agency. He has a B.A. degree in Philosophy, an M.A. in Psychology, and a background in human systems with experience in corporate training, administration, marketing and sales.