



Activ8 Your Family

Activ8 collaborates with The Certior Group to deliver a unique value proposition for families. We focus on the meaning behind the assets and the important interactions that create the context for wealth and wellbeing. The Certior Group has extensive experience helping clients align their values with their money decisions and Activ8 has deep experience helping clients get clear on where they want to go and step into, and sustain, transformative change. Together, we help our clients achieve major breakthroughs and enrich their life experiences within and across generations in four key ways:

RELATIONSHIPS

Generating healthier family dynamics is at the heart of our work, enabling families to “get unstuck” and move forward with important decisions and transactions. Families build stronger relationships by increasing transparency and candor and stepping into challenging conversations that deepen trust.

Recognizing that family histories run deep and family members can trigger each other, we introduce tools and practices to strengthen resiliency, enabling family members to repair relationships when breakdowns inevitably occur. By creating a new dynamic for effective communication and collaboration, family members are able to work through issues and generate successful outcomes.

ENRICHMENT

We introduce life principles and communications tools to help family members get clear on what’s important to them – and why. Understanding “the why” is key to setting goals, making commitments, gaining alignment and building cohesion – the bedrocks for effective action. These skills support family members in developing plans for themselves that are aligned with their values and aspirations and supporting other family members in gaining increased clarity regarding what they want to achieve in their lives.

We work with family members to develop a roadmap, which provides connective tissue between the experiences and tools, channeling the work into clear, actionable plans. This roadmap is a key tool that family members use in their journey – to move forward with clarity and ambition.

TRANSITIONS

Generational transitions are fraught with emotions, often driven by fear of the unknown. Parents are fearful of what will happen to family assets, businesses or legacies if they let go. Children are fearful of meeting expectations or are unaccustomed to being at point in family matters.

Our perspective is that most resistance is not due to fear of change, but to fear of being incompetent on the other side of change. We work with each generation to develop competency and comfort with transitions. As family members experience these shifts, we support them in developing governance frameworks to sustain family values and appropriate oversight across their shared interests.

AMBITION

Families thrive through the ambition and achievement of each successive generation – not just to preserve what has been created but to create anew.

Our process, by generating individual accountability and commitment to shared goals, makes transparent the collective ambition of the up-and-coming generations. This transparency is key to major decision-making and generational transitions.

“We just came back from a family vacation and it was the best one ever. Our family has been transformed. We are never going back to the way it was.”

-Family Member

“We are now able to get at strategies and implement recommendations that we have been trying to get at for over 5 years”

-Service Provider



