

L3 foundation

Family Retreat Thoughts

A family retreat is one of the most powerful investments a family can make in its long-term harmony, clarity, and legacy. In a world where schedules are full, responsibilities are complex, and wealth can unintentionally create distance or misunderstanding, stepping away together creates space for connection, reflection, and shared purpose.

A thoughtfully designed retreat allows family members to strengthen relationships, understand one another more deeply, and build the communication skills needed to navigate both opportunities and challenges. It also provides a rare forum to discuss values, history, stewardship, and the responsibilities that accompany wealth—conversations that rarely happen on their own. Ultimately, a family retreat isn't just a meeting; it's a gift to future generations, ensuring that the family's story, intentions, and bonds remain strong and aligned.

- Consider the environment for the retreat
 - Offices are not recommended because they don't create an atmosphere that encourage connections
- Logistics
 - Put them in writing
 - schedule free time (see examples at end of document)
 - Budget
 - Provide agendas and retreat folders
 - Provide note paper and pens
 - Have easel size post it and markers available
 - Division of labor
 - Attire
- Seek input from participants before setting agenda
- Try to get others to assume some of the responsibilities (finding a place to stay, restaurant reservations, room gifts, off site activities, etc.) so they feel ownership and a sense of contribution
- Rules
 - Put them in writing
 - Confidentiality - explain, DO NOT assume that everyone has the same definition
- Suggested assignments prior to retreat
 - Personality tests

- Photos
- Love letters
- Memories
- Plan fun events half of the retreat time
- Room gifts
- Integration of in-laws
- Ice breakers (The Ungame, Book of questions)
- Topics
 - Personality profiles
 - Family history
 - Traditions/ rituals
 - Lifelines
 - Family economic status
 - Family business
 - Family assets
 - Family properties
 - Family benefits
 - Family investment company
 - Safety nets
 - Estate planning
 - Trusts
 - Family partnerships
 - Taxation
 - Gifting
 - Durable power of attorney
 - Who gets what in personal property
 - End planning
 - how do you want your life to be celebrated?
 - Legacy
 - Generosity
 - Love letters
 - Health
 - Alcohol
 - Addictions
 - Mental health
 - Networking
 - Personal goals
 - 1 year
 - 5 year
 - Action plans

- Bucket lists
- Updates - personal and business
- “What we do” - a day in the life of
- Wishes and dreams
- Picture “show and tell”
 - It’s importance to you, the story associated with it
- Societal impacts on family future
- What I wish I could have told myself at 18
- The philosophy
 - of fishing
 - of golf
 - of cards
 - etc.
- The joy of play/ balance in life
- Outside resources present at retreat or made available to family members
 - Estate attorney
 - Tax attorney
 - Health specialists
 - Family counseling
 - Family member’s expertise

Free time activity ideas

- Cooking class
- Ballooning
- Hiking
- Biking
- Boating
- Jeep rides
- Sport shooting
- Oktoberfest
- Skiing - snow or water
- Golf
- Horseback riding
- Spirit guides/ readings
- Fishing - ocean/ lake/fly
- Photo sessions
- Wine tasting
- Antiquing/ thrift shops
- Spa treatments
- Charitable projects

- Concerts
- Theatre
- Comedy shows
- Rock climbing/ rappelling/ zip lining
- Outside resources for more ideas
 - Tour guides
 - Naturalists
 - Trainers
 - Golf lessons
 - Artists
 - Chefs