



# Strategy for the Wealthy Family: Seven Principles to Assure Riches to Riches Across Generations

By Mark Haynes Daniell

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"An excellent and comprehensive approach to the strategies required to understand, protect and grow family wealth across generations."

John Evans  
Managing Editor  
Private Banker International

"Strategy for the Wealthy Family expands the field of wealth planning and management by exploring beyond just financial concerns to consider critical human issues such as philanthropy and family leadership."

Professor Randel S. Carlock, Ph.D., INSEAD Business School  
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"The first book I have ever seen which fully addresses the all-important human side of the wealthy family as well as the financial aspects of family wealth management...an important book for any family, no matter how much wealth they have."

Vivian Imerman  
Entrepreneur

"Strategy for the Wealthy Family is a brilliant source of insight and information covering all aspects of family wealth management. This book is a perfect companion for private bankers, wealth managers, and wealthy families."

Christopher Wilson  
Managing Partner  
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"...a complete work of art for the wealthy."

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### Editorial Review

#### From the Inside Flap

There is a discreet world of the respected super-rich, where family legacies, high return portfolio investments, successful family businesses, philanthropic endeavors and protective trust practices have been refined and evolved to reach the highest levels of excellence.

Until today, the benefits and wisdom of that world have been inaccessible to most of us.

*Strategy for the Wealthy Family* brings to you the closely guarded wisdom and practical knowledge from some of the world's wealthiest and most successful families about how to become—and remain—wealthy across generations.

*Strategy for the Wealthy Family* provides a clear framework for highly informed strategic management of the family, the family business, the family's financial assets, the family's trust and tax-management activities, philanthropic activities, risk factors and the family's surrounding eco-system of institutions, advisors, friends and influencers. It also provides insights and an approach to ensure that the important individuality of all family members is fully reflected in every aspect of strategy for the greater family.

Defining true family wealth as far more than pure financial capital, *Strategy for the Wealthy Family* sets out insights and information to help you to grow, protect, transfer and share all aspects of your own family wealth successfully across future generations.

Ultimately, this is a book for those who wish to understand and manage their own family wealth to join the club of the world's best-managed wealthy families—and stay there.

It is indeed possible to beat the proverbial curse of "riches to rags in three generations." Whether you have \$1 million, \$1 billion, or even more, this book shows you how it can be done.

#### From the Back Cover

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#### About the Author

Mark Haynes Daniell is the founder and chairman of The Cuscaden Group, a privately owned investment and advisory business. Mr. Daniell is a former director of Bain & Company, one of the world’s leading strategy consulting firms, where he worked for more than 20 years with some of the world’s wealthiest families and their businesses around the world. He also served as a Director of Wasserstein Perella, a boutique mergers and acquisitions advisory firm in London and Paris, and was the founder and chairman of Singapore’s national Private Wealth Management Initiative. An independent director of Olam International, a multi-billion dollar international logistics business, Mr. Daniell has also been President of k1 Ventures, a publicly listed strategic investment company, and is a director of a number of privately owned companies. Mr. Daniell holds a *juris doctor* degree from the Harvard Law School, an Honors degree in jurisprudence (B.A. and M.A.) from Oxford University (University College), a B.A. degree from Amherst College, a C.E.P from the Institut d’Etudes Politiques de Paris and a D.E.F from the Sorbonne-Université de Paris IV. He is also a High Honors graduate of The Phillips Exeter Academy in the United States. In addition to authoring five books on wealth management, business strategy and global affairs, Mr. Daniell has contributed numerous articles to *The Wall Street Journal* and business publications. He is a frequent expert guest commentator on business and economic affairs for CNBC, the BBC, CNN, and Channel NewsAsia.

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