



The Rising Forums™

Become the Best Version of Yourself

A new, revolutionary Millennial experience for enlarging vision, unlocking potential, advancing wisdom, strengthening family, realizing purpose, and living an abundant life. It's a transformational journey with a cohort of peers through a Masters Class on Life, Family, Career, and Business to prepare the rising generations to steward the family's legacy, wealth, and business interests.

Rising Leaders Forum® | Rising Gens in Family Business

Rising Generations Forum® | Rising Gens Inheriting Wealth

Rising Entrepreneurs Forum® | Rising Gen Entrepreneurs

Four Causes of the Legacy Crisis

It's as Much a 'People Problem' as a 'Financial Problem'



According to a Survey
of 3,250 Families who
had Lost Their Wealth

3%

Poor Planning &
Investments

12%

Lack of
Awareness
& Complacency

25%

Heirs Unprepared
for the
Responsibility

60%

Lack of
Communication
& Trust in Family

Rising Forums™ Overview

Your Choice of a 1, 2, or 3 Year Journey

Why?

- End "Shirtsleeves to Shirtsleeves..."
- To Transition the Family's Legacy, Wealth, and Business Interests to Future Generations.
- For Everyone to Unlock Their Full Potential.
- Transformational & Life-Changing Journey.
- A Master-Level Class on Life, Business, and Multi-Generational Success.
- An All-in-One, Focused Experience.

What?

Who?

- 12 Member Cohort on a Parallel Journey through Life.
- Matriarch|Patriarch & Family Business Leaders.
- A Da Vinci Forum Dean & Da Vinci Consultants
- 27 Family & Business Experts
- 3 Professional Firms: *Accounting, Law, & Wealth Management.*

How?

- Guided by the Forum's Dean
- Forum Activities, Info, Communications, and Resources are Supported by a Digital App.
- 9 Learning Experiences Over the Forum Year.
- Structured Around 10 Learning Components
- Local, Regional, or National Forum Structures.
- Video Conferencing and In-Person Gatherings.
- Recordings of Expert's and Professional's Presentations.

Where?

TOP 10

Rising Gen Reasons to Become a Member

Discover Your
"Why" and Live
Your Passion

1

Unlock Your
Full Potential
and Unique
Abilities.

2

Live with
Intention by
Designing a
Life Plan of
Meaning and
Adventure.

3

Fulfill Your
Destiny by
Envisioning
Possibilities &
Overcoming
Challenges.

4

Position
Yourself to
Steward Your
Family's
Legacy, Wealth
& Business.

5

Grow You and
Your Family's
Financial and
Non-Financial
Wealth

6

Challenge
Yourself to be
the "Best
Version of You"
with Life &
Business Coach

7

Build Stronger
Personal,
Family, and
Business
Relationships &
Networks

8

Grow in
Wisdom and
Knowledge by
Learning From
World-Class
Experts

9

Leverage the
Power of
Having Your
Own Peer
Community &
Mastermind

10

Re-Defining "Wealth"

“

It's at the **Convergence of Your Financial and Non-Financial Wealth**
Where You Will Find Solutions to Life's Most Perplexing Problems.

Most people **Solely** associate **Money** with **Wealth**—and that's the problem!
At Da Vinci Global Consulting, we **Define "wealth" Differently.**

”

— *Michael Beduze, Managing Partner*

Grow ♦ Manage ♦ Protect ♦ Perpetuate

YOUR TOTAL WEALTH | Financial & Non-Financial

YOUR LIFE CURRENCIES™

TIME

*A finite currency that can
end at any moment.*

TALENT

*A currency that fulfills
calling and purpose.*

MONEY

A limitless, powerful currency.

RELATIONSHIPS

*The most meaningful and
lasting currency.*



Every LIFE CURRENCY™ decision you make
GROWS or **DIMINISHES** your LIFE CAPITALS.



YOUR LIFE CAPITALS™

FINANCIAL CAPITAL

Any asset found on a balance sheet or financial statement along with financial structures and systems.

HUMAN CAPITAL *

Virtues, passions, traditions, interests, likes, instincts, gifts, and our "wiring"—what makes us unique.

INTELLECTUAL CAPITAL *

Formal education, capabilities, experiential knowledge, skills, insights, and financial, business, and emotional intelligence.

SPIRITUAL CAPITAL *

Beliefs, faith, love, values, higher-purpose, wisdom, and meaning of life—our 'North Star' that navigates us through life.

SOCIAL CAPITAL *

Serving others, paying-it-forward, networking, civic duty, politics, taxes, and giving ourselves and our resources to others and for good causes.

ENTREPRENEURIAL CAPITAL *

Capacity, initiative, and risk-taking to develop, organize and manage a venture to solve problems for profit or social good (non-profit).



* These capitals represent non-financial wealth that each individual and family possess at various levels.

10 RISING FORUM™ MASTERY COMPONENTS

01	 World-Class, Best Practices Workshops <p>Learn 27 best practices and innovative solutions for life, family, and business from direct access to 27 best-of-breed, subject matter experts from across the country.</p>
02	 Advisor Strategy Briefings <p>Gain wisdom and knowledge from advisors in a myriad of professional fields on topics of importance for success in life, family, and business.</p>
03	 Experiential Learning <p>Apply what you learn to grow personally and professionally while strengthening and bringing tremendous value to you, your family, career, and family business.</p>
04	 Life and Business Coaching <p>Receive encouragement, gain insights, make dreams a reality, hear unbiased feedback, be held accountable to succeed, and GROW on all levels.</p>
05	 Peer Community <p>Develop deep, life-long relationships with peers from different careers, regions, industries, and family cultures.</p>
06	 Mentoring <p>Forum learning experiences are coordinated with family and business leaders who are briefed to allow for coordination, collaboration, and mentoring.</p>
07	 Resource Network <p>Interact with 27 experts spanning the realms of life, family, business along with many professional disciplines that will be valuable resources for years to come.</p>
08	 Mastermind Cohort <p>Network, share ideas, troubleshoot problems, innovate, and get valuable feedback from your fellow members and your Forum Dean.</p>
09	 Innovation & Technology Symposiums <p>Bi-annual introductions to emerging innovations and technologies for personal development, life, and business.</p>
10	 Stakeholder Consultations <p>Bi-annual private meetings with each member's family, their Dean, advisors, and other stakeholders to enhance communications and leverage best practice ideas.</p>

THE RISING FORUM CURRICULUM *

You Will Learn to Express Each Topic Based on Your Uniqueness

27 Best Practices

1. Life Plan
2. Communication Skills & Conflict Resolution
3. Career Planning & Networking
4. Emotional Intelligence
5. Time Management & Work-Life Balance
6. Family Governance
7. Board Service
8. Family Office
9. Philanthropy
10. Teamwork and Team Building
11. Leadership Development
12. Employee Engagement
13. Strategic Planning
14. Hiring & Compensation
15. Marketing & Sales
16. Customer Service & Psychographics
17. Operations
18. Innovation & I.P. Rights
19. Family & Business Culture
20. Organizational Alignment & Change Mgmt.
21. Business Modeling
22. Your True North: Ethics
23. Visioneering
24. Banking & Alternative Financing
25. Politics & Politicians
26. Business Governance
27. Mergers & Acquisitions

27 Strategy Briefings

1. Income Tax Planning
2. Financial Planning Process
3. Retirement Planning
4. Life, Disability & Long-Term Care
5. Trusts
6. Estate Planning
7. Shareholder Agreements
8. Investment Strategies
9. Charitable Foundations
10. Executive Benefits
11. Legal Document Review
12. Employee Benefits
13. Key Performance Indicators
14. Employment Law
15. Cyber Security
16. Commercial P&C Insurance
17. Risk Management
18. Intellectual Property Rights
19. Business Valuation
20. Bankruptcy
21. Business Structures
22. Cash Flow Management
23. Capital Formation
24. Financial Statements
25. Forecasting & KPIs
26. Board Governance
27. Mergers & Acquisitions

** Subject to change*

RIISING FORUM TECHNOLOGY



QUEST JOURNEY

Provides all Forum instructions, materials, assignments, and scheduling.



QUEST RESOURCES

All workshop recordings, white papers, handouts, articles, and other resources.



QUEST SCORECARD

Member performance monitoring, leaderboard, gamification, and friendly challenges.



QUEST COMMUNITY

24/7 communication among members, deans, experts either privately or in group structures.



QUEST FEEDBACK

Questionnaires, surveys, polling, and other feedback options.

DA VINCI

GLOBAL CONSULTING, LLC

An Independent Consulting Firm

Serving Families of Wealth and their Businesses

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