

Prospectus

Family Wealth Consulting Services



Cathexis Group

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Executive Summary

Cathexis Group is an consulting firm that helps families of significant wealth build strong legacies. Our service fortifies family culture, strengthens communication, and invigorates stewardship. We support these qualitative aspects of wealth through bespoke processes, tailored to the needs and vision of each family we serve. We incorporate psychological expertise, refined family governance strategies, and practical lessons from working with leading global families, to help our clients work and live together better.

Meet Your Team



Charles Eckhart, PhD

Co-Founder | CEO



Oksana Yakushko, PhD

Co-Founder | Strategic Advisor

Building on decades of clinical and academic work, experience in strategic consulting, and behavioral economics, our team draws on the best of research, theory, and practice, to shape our services. Our guidance helps families navigate challenges, build for the future, and create meaningful, mission-focused family wealth planning.

Who Do We Serve?

We serve families that seek to create cohesive family vision, prepare future family leaders for stewardship, implement effective family governance strategies, resolve conflict, and use their wealth in meaningful ways. Our families recognize that significant wealth requires distinctive, strategic support in answering questions, such as:

How do I help my children develop independence, agency, and passion, while also learning to steward wealth?

How do we build a strong and enduring family culture, legacy, and identity?

How can we grow our family's ability to make collaborative decisions around investing, philanthropy, and our future?

How can we bridge personal, cultural, and/or generational differences in ways that let us work together better, and resolve impasses or conflicts?

When do I talk to my children about our wealth, and how do we do it?

How do we navigate the coming transition in our family, and emerge stronger as a result?

What can we do to best prepare the rising generation to become strong leaders and principled stewards of wealth?

How can we parent in ways that pass on values of adaptiveness, perseverance, humility, and service?

If these questions remind you of your family, or a family you work with, we may be able to help.

Guiding Philosophy

Families are living ecologies that comprise individuals, a family culture and identity, and innumerable strengths and challenges. As with all living things, families should be adaptive, evolving, and growing. Thus, effective consultation needs to be commensurately dynamic, and as distinctive, as the family it serves

We craft family dynamics and governance solutions that contour responsively to your families culture and needs. Our techniques curate customized processes that honor your family's complexity, rather than reduce it through standard, snapshot protocols and platform processes.

We help families:



Build effective communication strategies to scale

Clarify values, mission, and stakeholder responsibilities

Integrate wisdom of the past to cultivate vision of the future



Improve collective decision-making and stewardship

Enhance capacity to navigate and resolve conflict

Strengthen respect for differences while sharing collective vision



Deepen generational relationships with tradition, stories, and shared mythology

In short, we help families who have acquired significant financial wealth address the “integration challenge” inherent to that wealth, and build flourishing generational families.

Organizing Principles

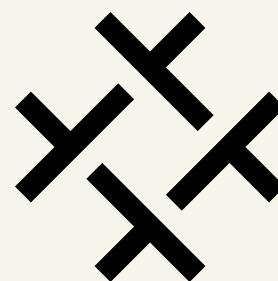
We believe the greatest resource of every family is their qualitative capital.

We believe a families' culture, rituals, and shared stewardship create significant resilience, purpose, and connections over generations.

We believe all families have complexity and challenges, and sophisticated strategic consultation should be customized to each family.

We believe life has inevitable losses, challenges, disappointments, and tragedies, but meaningful connections with family and friends make the challenges of life much easier.

We believe that commitment, curiosity, and willingness to have courageous conversations, can foster significant resolution and growth.





Each engagement is highly differentiated, each process uniquely attuned to the needs of each family.

The following phase outlines are generally demonstrative of that work:

Phase 1: Discovery, Observation, Goals and Vision

We begin with a process of discovery. By understanding the hopes, goals, and concerns nested the constellation of individuals comprised by your family architecture, we collaboratively define a course of action.

Phase 2: Beginning Engagement and Working Through

By deepening assessment, we locate strengths, challenges, upcoming transitions, and key players in family development. We unpack conflicts and build new skills, we facilitate insight. Often, this phase includes 1-1 or dyadic work with family leaders, relationship building, and strategic coaching with next generation members.

Phase 3: Implementing and Integrating New Insights and Practices

We implement the insights and skills from phase 2 in more complex configurations. By hosting family meetings and retreats, we facilitate meaningful but challenging conversations, embrace family challenges, and begin to build something new. We may work on shared decision-making, family governance councils, or conflict resolution. To bolster these processes, we focus on development of family rituals and shared time that fortifies family bonds.

Phase 4: Strategic Support through Continued Growing and Supported Learning

We believe “learning and growing families” are those families that fair best in the stewardship of generational wealth. Families that enjoy time together, are curious about one another, and want to grow and learn together can build immutable bonds, and excellently prepare future generations. All of our family engagements eventually scale back, but many families choose to continue with yearly or biyearly family meetings and situation-support to foster continued growth over time and through transitions.

Our services are made-to-measure, thus our fee structure is shaped by the scope of your needs. The following elements are considered in the course of each engagement.

Time and Commitment

Working to achieve family growth takes time and commitment from the family and the consultants. Initial conversations help square the families' goals, the availability of the family and consultants, and the timeline for which the work can be reasonably completed. We avoid engaging with families if we do not have the necessary time to help, or if they are not sufficiently available or aligned.

Deliverables

Each engagement includes customized deliverables to support, clarify, and fortify each family member's work. These may include summaries of 1-1 sessions, reading suggestions, family experiments, and more.

Fee Structure

We intentionally limit our active clientele bookings to select families, in order to retain a high degree of focus and fidelity in our service delivery. This concentration lends to the work being expensive, and we believe that pricing should unequivocally reflect value: we hold ourselves accountable, and expect families to hold us accountable, for exquisite delivery of services. We are available to discuss our fee structure with any interested family members or advisors.

When Do We Finish?

We work to balance two goals: to help families grow and evolve, but also to help them utilize new skills and processes to become self-sufficient. We will work collaboratively with your family to find the right timeline, and conclude our work when complete.

Fee Structure