



## **Family Legacies Inc. Overview for Wealth and Estate Advisors**

***Preserving Life Stories, Family Histories,  
and Ethical Wills in Feature Film Quality  
Nationally and Internationally Since 2000***



***Connecting generations past, present, and future in ways  
you and your clients have never imagined...***

# Overview

Families want to deepen their relationships with current generations and to connect with their heritage and their future. For wealth advisors, being part of this process enables you to establish powerful connections with rising generations, while deepening your bonds with existing clients.

At Family Legacies, we know that each and every client is a precious and unique source of a lifetime of knowledge and wisdom. There is no greater honor than helping them to immortalize their values, wisdom, and success stories for present and future generations.



Family Legacies has produced over 200 family history documentary films. In the course of creating each one, we address all aspects of life stories and family relationships, including financial matters and the values that created a successful life, using the latest cutting-edge technologies in a feature film format. Our films serve to educate and inspire present, rising, and future generations not yet born.

When it comes to estate planning, the power of a family legacy film is in the personalizing of the message. For heirs, watching their parents or grandparents on film, passionately expressing the details of their ethical will or family vision statement creates a powerful dynamic not possible in a written will. *Imagine a family of heirs*

*gathered in the office of the estate attorney, and in addition to the written words, she presses “play” and the family sees and hears the details and explanations from their loved ones themselves.*

The gift of an inheritance is more meaningful when it's combined with the stories of the blood, sweat, and tears and business strategies behind the creation and preservation of the wealth. Our films help impart financial wisdom, values of philanthropy and the bases for the ways a family chooses to distribute inheritances through the lens of background details and stories.

*Imagine your clients showing their family legacy film at a family gathering followed by a Q&A session led by the family matriarch and patriarch, so that family members develop a full understanding of their family history, family lore and values. It also serves as an effective tool to onboard new family members and steep them in the family history and culture.*

Family Legacies also plans private, catered screenings of the family legacy film either in a rented movie theater or in the home theater of the family matriarch and patriarch, where the extended family along with wealth advisors are invited to watch the film. This is a great opportunity for wealth advisors to meet all of the extended family.



# Family History and Legacy Preservation

**Along with preserving wealth, families can now preserve and bequeath their legacy – the stories and values that explain their success – through a professionally produced video.**

**Film and video are the medium of choice for present and rising generations to understand their roots and family history.**

With 21st century technology, the matriarch and patriarch of the family are able to share their stories and educate their families. Families gain a new and deeper understanding of the family's formula for success and an appreciation for the blood, sweat, and tears behind the creation of a family business and overcoming obstacles. They also gain perspective into the values most important to their parents, grandparents and great grandparents.

**Our lives are made up of the stories that educate, motivate, inspire, mentor, and entertain present and future generations.**

Thus, those lives and stories need to be properly documented, shared, and presented via a medium where they will be most understood and appreciated. Family Legacies team of professional interviewers, film crews and editors produce high quality videos and films to bring those stories to life, resulting in many benefits for generations to come.

In their family's experience in preserving their history, Marty and Marlene wanted to make sure that despite the wealth they were passing down to their children and grandchildren, those family members would be motivated to continue the philanthropy and tradition of giving back to the community. By sharing their stories of hard work in building the business and their community involvement and philanthropy, the strong messages of their values came through very clearly in the video documentary of their lives. And in the video's "Ethical Will" section, Marty and Marlene clearly articulated that any inheritance



would come with an expectation of self-sufficiency, philanthropy, and caring for those less fortunate.

**When we ask parents to share their stories, we honor their lives.**

Legendary businessman and real estate pioneer, Bill, built up the largest residential and commercial real estate companies in the western United States. His daughter engaged Family Legacies who preserved his life story and secrets to success. At the time, Bill's grandson was in college and dreamed of one day taking over his grandfather's real estate empire. Sadly, before this could happen, Bill developed Alzheimer's disease. But the roadmap to his secrets for success in life and in business was well documented in Bill's own words in the film produced for this family. For Bill's grandson, this film is priceless.

**As we pass down our stories, we give future generations an invaluable gift.**

Cat, a cowgirl and a rancher, was a descendant from a billionaire family on the East Coast. She decided to donate her beautiful ranch property to a non-profit acquiring and maintaining land for open space for the public. As part of her life history film she gave the background to her choices so that future generations could learn from her example



# The Stories Behind The Wealth

## **Children gain a sense of their roots, learning that they belong to something bigger than themselves.**

Sabina and Hirabai grew up in the Gujarat Province of India. They were simple farmers, living in a hut with buffalo dung floors and only two rooms – one for the humans and one for the animals. They moved to London and then the U.S. where their son built a highly successful international hotel management company. Having a family history film meant so much to them, almost like a time machine. In this way, they built a connection with their descendants born in America, bringing to life their fascinating rags to riches story, while sharing their culture, religion and tradition. They created a bridge from the past to the future.

## **We tell our stories to transform ourselves, and relive our experiences to transcend them and teach our children.**

Many people find the process of reliving their life very cathartic. After recounting their many achievements and obstacles overcome during a lifetime, many people realize how strong they have been. Through this process, they feel like they can handle anything. Irving's family arranged for his family legacy to be produced on film. But shortly before the first day of filming, he received a terminal cancer diagnosis and wanted to cancel. His family urged him to keep the film date and he reluctantly agreed. Recounting the many wonderful memories of his life was much like counting his blessings, and on the last day of filming he said, "I realize I've had a very long, full and wonderful life. I feel that it's okay to go now." Irving's children said that having their father's life history on film made their loss a little easier to bear because they had a part of him in perpetuity.

## **Adult children see their parents and in-laws from a new perspective and gain a deeper understanding and appreciation of their lives.**

A family video can lead to healing of wounds, sometimes based on misunderstandings. Rita felt taken for granted for everything she did for her in-laws who lived in her family's home. But after she watched her in-laws' family legacy film she said, "Hearing them call me a daughter, not just a daughter-in-law and describe in great detail how much they appreciate me and all the ways I care for them, changed my outlook and changed the entire atmosphere in our household."

## **There's an African saying, "When an elder dies, it's as if an entire library has burned down".**

But with today's technology, the library can be preserved. A professional documentary of a family's story not only will capture the volumes in that library, but also will give voice to each family member's personality, sense of humor and values and enable the library to thrive for generations.

## **Family Legacies Inc. produces feature film quality life histories throughout the U.S. and around the globe.**

Susan Brody, President, works with you, the trusted family advisor to add value to your services in providing an unforgettable experience for the families you serve, while connecting you in a powerful and incomparable way to the rising generation. Our films highlight your essential role in the preservation of the family wealth, and help you prepare your families for the future

For more information, call: 303-503-5697 or visit: [www.FamilyLegaciesVideos.com](http://www.FamilyLegaciesVideos.com).

# The Family Legacies Experience

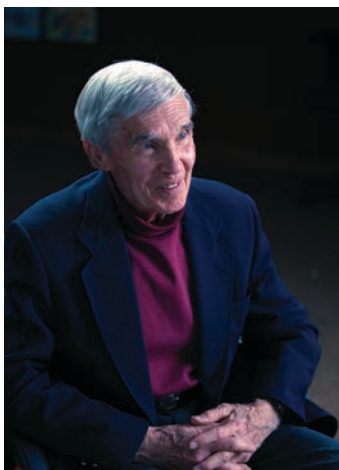
**Our clients tell us that the experience of preparing for and filming their family legacy is just as enjoyable and interesting as the final product.**



Dear Susan,  
The entire process of preparing for our family legacy film has been amazing in more ways than I ever imagined, from the pre-interview you conducted with us in Aspen to the film day with our entire family in La Jolla. We will treasure not only the video but the entire experience of preparing and filming forever!"

## Step 1:

Before the film date, your clients will get to know our professional interviewer who will ask them questions, get the ideas rolling and make sure they are 100% prepared and comfortable for the film date. This pre-interview process enables our interviewer to prepare relevant and interesting questions for the film date. We will also help them go through their photographs, documents and old video footage, labeling them to use in their family documentary.



## Step 2:

On the day(s) of your clients filming adventure, our professional film crew sets up a film studio in your client's home, while they relax and let our talented makeup artists and hair stylists pamper them, making sure they look their best.



In the meantime, our professional scanning technician will be scanning and labeling the photographs and documents they want to include in the film, on-site, so they never have to leave your client's home.



# The Family Legacies Experience

## Step 3:

Our interviewer will lead your clients through their family history, the stories of their life, and help them weave in the values and important life lessons they want to pass down to future generations, including their ethical will.



When interviewing family members together, we'll discuss important subjects and feelings. There is nothing more powerful and healing than for parents to learn from their own children what life lessons they've taken away from their life, or for a child to learn what their parents admire and respect most about them. Our clients tell us that after reliving their lives, the obstacles they've overcome, and the achievements they've treasured, they feel like there's nothing in life they can't handle.



## Step 4:

Finishing the filming with your client's Ethical Will or Family Vision Statement, with the option of being surrounded by their children and grandchildren.



## Step 5:

After the film date, our award-winning editors create a magnificent and engaging family history documentary film that will have your client's audience laughing and crying throughout.



# The Family Legacies Experience

## Option:

Using drones, Family Legacies films aerial video of your client's home or other properties to incorporate in their family history – a wonderful way to showcase some of the major accomplishments of their lifetime.



## Final Product

### 1. Film Length:

We offer a variety of video lengths that vary according to the client's needs as follows:

- A feature film length of 90 minutes to 2 hours.
- A mini-series length for viewing in chapters as one would read a biography. This option is generally used when the client wants to include extensive details on a particular subject, such as the secrets to how they created a successful business, survived combat in a war, etc.
- A highlights version of 20 – 30 minutes to show at special occasions and eventually at funeral or celebration of life services.
- Many of our clients will choose to purchase two or all three different lengths for their final product.

### 2. Delivery Format:

Family Legacies delivers the final product in any format of the client's choosing from:

- Beautifully designed DVD's.
- Beautifully designed Blu Ray discs.
- All digital formats including jump drives, hard drives, and downloadable digital files.
- Formatted films to work with movie projectors.
- Password protected web page for the family to share digitally with whomever they choose.
- We will ship the final product to all family members in the format of their choosing.

## Pricing

Our prices vary depending on the length of the final film, number of days of filming (we generally film over one to three days), number of people participating in the film, the editing process for the particular project, and other factors such as location and the cost of travel for the Family Legacies staff, film crew, and others. Prices start at \$40,000 and can go up to \$200,000, depending on these and other criteria.



**Every aspect of working with you was a pleasure! Preparing for and filming our family legacy was one of the best things we've ever done in our lives. And our video is a priceless treasure!"**



*Our films enable families to connect with,  
inspire, motivate, educate, entertain, inform,  
guide, and mentor their family today  
and for generations to come.*



**Phone: 303-503-5697**

**Email: [Susan@FamilyLegaciesVideos.com](mailto:Susan@FamilyLegaciesVideos.com)**

**Website: [FamilyLegaciesVideos.com](http://FamilyLegaciesVideos.com)**