

Packed with insights and practical guidance, these recommended books cover a broad range of topics that address the needs and interests of high-net-worth families and their advisors. The topics include: (1) Family Journey (2) Family Relations (3) Family Learning (4) Operating Businesses (5) Family Philanthropy (6) Family Office (7) Enterprise Governance (8) Investment Management (9) Wealth Management (10) Trust and Estate Planning (11) Lifestyle Services (12) Human Capital (13) Technology. The book titles are listed in chronological order, beginning with the most recent titles appearing at the top for each topic category.

▶ Family Journey

[Engaged Healthy, Wealthy & Wise](#)

Coventry Edwards-Pitt, 2023, *adapted description from Ballentine Partners and Amazon.com*

At a certain level of wealth, money makes parenting harder, not easier. *Raised Healthy, Wealthy & Wise* breaks new ground in the field of raising children amid wealth by hearing from the success stories: real-life children with wealth now grown into happy and productive adults. Through the voice of the inheritors and their significant others, lessons are shared on how they have navigated love and family wealth and forged their own joint path to lead fulfilling lives.

[Generations: The Real Differences Between Gen Z, Millennials, Gen X, Boomers, and Silents—and What They Mean for America’s Future](#)

Jean M. Twenge, 2023, *adapted description from Amazon.com*

A groundbreaking, revelatory portrait of the six generations that currently live in the United States and how they connect, conflict, and compete with one another. They have had vastly different life experiences and thus, one assumes, they must have vastly diverging beliefs and behaviors. But what are those differences, what causes them, and how deep do they run? Professor of psychology and “reigning expert on generational change,” Jean Twenge summarizes three decades of research and survey data from 39 million people to paint a portrait of six American generations. With her clear-eyed and insightful voice, Twenge explores what the Silents and Boomers want out of the rest of their lives; how Gen X-ers are facing middle age; the ideals of Millennials as parents and in the workplace; and how Gen Z has been changed by COVID, among other fascinating topics. Surprising, engaging, and informative, *Generations*, will forever change the way you view your parents, peers, coworkers, and children, no matter which generation you call your own.

[The Myth of the Silver Spoon: Navigating Family Wealth and Creating an Impactful Life](#)

Kristin Keffeler, 2022, *adapted description from Amazon.com*

Being raised in affluence brings a unique set of pressures and hidden tripwires. By navigating those challenges without succumbing to fears and negativity, inheritors and their families can create a more purposeful path. Through new research, meaningful storytelling, and actionable concepts, *The Myth of Silver Spoon* offers a compassionate discussion and a seven-step process for connecting a rising gen’s innate strengths to the embers of their hopes, so that they can move forward creating thriving and impactful lives.

[Bridging Generations: Transitioning Family Wealth and Values for a Sustainable Legacy](#)

Roy O. Williams and Amy A. Castoro, 2017, *adapted description from Amazon.com*

From years of field experience working with families and their trusted advisors, Roy O. Williams and Amy A. Castoro take the conversation on preparing heirs to a new level of understanding and action. This book provides insights, strategies, and compelling stories on how family wealth and family values can be successfully passed on from one generation to the next, and with the family unity intact.

[Shoe Dog: A Memoir by the Creator of Nike](#)

Phil Knight, 2016, *adapted description from Amazon.com*

In this candid and riveting memoir, Nike founder and board chairman Phil Knight shares the inside story of the company's early days as an intrepid start-up and its evolution into one of the worlds most iconic, game-changing, and profitable brands. Wrestling with life's Great Questions when he was twenty-four years old and backpacking through Asia, Europe, and Africa, Knight decided the unconventional path was the only one for him. Rather than work for a big corporation, he would go on to create something all his own, something new, dynamic, different.

[Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times](#)

Mark Haynes Daniell and Sara Hamilton, 2010, *adapted description from Amazon.com*

Family legacy and leadership are important subjects that have a great influence on the future of the family as a whole and a profound impact on the lives of its individual members. Although each family has its own history and unique destiny, this book will bring to all families a deeper understanding of their legacies and a practical approach to their leadership. As a result, leaders, members, and advisors alike will be able to manage comfortably both the continuity and change that families require.

▶ Family Relations

[The Quest for Legitimacy: How Children of Prominent Families Discover Their Unique Place in the World](#)

Jamie Weiner, 2022, *adapted description from Amazon.com*

Relying on qualitative research conducted on wealthy families, Dr. James Weiner delivers a unique and eye-opening discussion of the Rising Generation's quest for self-determination in the shadow of a larger-than-life family. This is an essential read for anyone navigating the complex dynamics of accomplished families.

[We Need to Talk: A Memoir About Wealth](#)

Jennifer Risher, 2020, *adapted description from Amazon.com*

When Jennifer Risher joined Microsoft in 1991, she met her husband, and with him became an extra-lucky beneficiary of the dot-com boom. By their early thirties, they had tens of millions of dollars. Jennifer's thought-provoking, personal story includes the voices of others in her demographic and explores the hidden impact of wealth on identity, relationships, and sense of place in the world. At a time when money is still a taboo subject, Jennifer's memoir, *We Need to Talk*, is a catalyst for conversation that demystifies wealth and inspires us to connect. In a discussion with Mindy Earley at the [2021 FOX Family Forum](#), Jennifer shares more thoughts on the hidden impact of wealth.

▶ Family Learning

[Money Skills for Teens: A Beginner's Guide to Budgeting, Saving, and Investing](#)

Ferne Bowe, 2023, *adapted description from Amazon.com*

While the teenage years are exciting times, they can also be daunting. With so much to learn and so many new experiences, it's easy to feel overwhelmed by the responsibility of growing up. And when it comes to money, it's crucial to know how to manage it. Using real-life examples and easy-to-understand language, this book provides practical advice to help teens develop a healthy relationship with money. From budgeting and saving for emergencies to investing in stocks and using credit responsibly, this book is the go-to beginner's guide to personal finance for teenagers.

[Prepared: What Kids Need for a Fulfilled Life](#)

Diane Tavenner, 2019, *adapted description from Amazon.com*

Through personal stories and hard-earned lessons from the Summit Public Schools's exceptional team of educators and diverse students, Diane Tavenner shares the learning philosophies underlying the Summit model and offers a blueprint for any parent who want to stop worrying about their children's future—and start helping them prepare for it.

[The Opposite of Spoiled: Raising Kids Who Are Grounded, Generous, and Smart About Money](#)

Ron Lieber, 2015, *adapted description from Amazon.com*

Grounded in real-world experience and stories from families with a range of incomes, *The Opposite of Spoiled* is both a practical guidebook and a values-based philosophy. The book delivers a taboo-shattering manifesto that explains how talking openly to children about money can help parents raise modest, patient, grounded young adults who are financially wise beyond their years.

[Raising Financially Fit Kids](#)

Joline Godfrey, 2013, *adapted description from Amazon.com*

At the heart of the book is a developmental map covering 10 specific money skills children can master before the age of 18 to become financially secure adults. More than just a money book, *Raising Financially Fit Kids* will help parents send kids into the world as balanced young adults who exercise good judgment, practice responsible habits, and live financially stable lives.

▶ Operating Businesses

[Your Business, Your Family, Your Legacy: Building a Multigenerational Family Business That Lasts](#)

George A. Isaac, 2020, *adapted description from Amazon.com*

Whether you are an experienced family business or family office executive, board member, owner, or next-generation family member, George Isaac has written the definitive handbook on the challenges of managing a multi-generational family enterprise. This book discusses best practices for all the key issues associated with family businesses.

[The Infinite Game](#)

Simon Sinek, 2019, *adapted description from Amazon.com*

In this revelatory book, Simon Sinek offers a framework for leading with an infinite mindset, where leaders commit to a vision of a future shaped from five essential practices: advancing a Just Cause; building trusting teams; studying your worthy rivals; preparing for existential flexibility; and demonstrating the courage to lead that will leave their organizations in a better condition than they found them.

[Measure What Matters](#)

John Doerr, 2018, *adapted description from Amazon.com*

In the goal-setting system of Objectives and Key Results (OKRs), objectives define what you seek to achieve, and key results are how those top-priority goals will be attained with specific, measurable actions within a set time frame. The benefits of OKRs are profound, including keeping employees on track and linking objectives across silos to unify and strengthen the entire company, enhancing workplace satisfaction, and boosting retention. Doerr shares a broad range of first-person, behind-the-scenes case studies to demonstrate the focus, agility, and explosive growth that OKRs have spurred at so many great organizations.

▶ Family Philanthropy

[Family Philanthropy Navigator: The Inspirational Guide for Philanthropic Families on Their Giving Journey](#)

Peter Vogel, Etienne Eichenberger, Malgorzata Kurak, 2020, *adapted description from Amazon.com*

Philanthropy is an important and highly rewarding way for individuals and families to make a difference in a rapidly changing world. Like the world around us, philanthropy is changing and transforming, and philanthropic families are seeking out new ways to ensure that their giving is meaningful and impactful. *The Family Philanthropy Navigator* offers an easy-to-use, step-by-step inspirational guide for new and existing philanthropic families to initiate or enhance their journey in giving.

[Putting Wealth to Work: Philanthropy for Today or Investing for Tomorrow?](#)

Joel L. Fleishman, 2017, *adapted description from Amazon.com*

By 2025, Americans will likely be donating over half a trillion dollars annually to nonprofit organizations. Those philanthropic gifts will transform significant parts of America's civic sector landscape. In *Putting Wealth to Work*, Joel L. Fleishman provides expert analysis of contemporary philanthropy, offering invaluable insight for those engaging with and affected by charitable foundations. This is the fascinating and definitive account of philanthropy today, and an indispensable guide to understanding its inner workings, impact, and expansive potential.

▶ Family Office

[The Family Office: A Comprehensive Guide for Advisers, Practitioners, and Students](#)

William I. Woodson and Edward V. Marshall, 2021, *adapted description from Amazon.com*

This guidebook provides an insider's view for anyone looking to understand family offices and how to best serve and advise them. The veteran practitioners William I. Woodson and Edward V. Marshall offer a thorough guide to family offices: why wealthy families create them, what they do, and how to manage them effectively. They present these insights through a series of problem-based learning cases that follow a single family's journey from the time of a significant liquidity event; through the creation, staffing, and management of their family office; and on to its succession. They shed light on the unique issues that ultrawealthy families face and the solutions they adopt to address them throughout the life cycle of a family office.

▶ Enterprise Governance

[Borrowed from Your Grandchildren: The Evolution of 100-Year Family Enterprises](#)

Dennis T. Jaffe, 2020, *adapted description from Amazon.com*

While creating wealth is a wonderful achievement, business families are also concerned with how their wealth is used to support their values, the lives of their children, and the well-being of the community. Over several generations, families who are successful in growing their wealth have been able to reinvent themselves and their business in the face of significant environmental transformations and internal differences caused by family dynamics. *Borrowed from Your Grandchildren* is a fascinating look at how large, long-lasting business families succeed across generations.

▶ Investment Management

[Advanced Introduction to Private Equity](#)

Paul A. Gompers and Steven N. Kaplan, 2022, *adapted description from Amazon.com*

Integrating insights from academic research with examples to derive practical recommendations, *Advanced Introduction* provides an illustrative guide to private equity. Paul Gompers and Steven Kaplan begin by reviewing the history of private equity then exploring the evidence on performance of private equity investments at both the portfolio company level and fund level, documenting the creation of economic value. The book then presents a set of actionable frameworks for driving value creation in private equity investments. It concludes by examining how private equity investors raise funds and how they successfully manage their private equity firms.

[The Taxable Investor's Manifesto: Wealth Management Strategies to Last a Lifetime](#)

Stuart E. Lucas, 2020, *adapted description from Amazon.com*

With the deep industry knowledge of a seasoned practitioner, *The Taxable Investors Manifesto* sensibly folds tax incentives into investment strategy in ways that can add profound value over a lifetime to actual results. It includes guidance on how to keep a greater percentage of your profits with a higher probability of success and less effort; why it is important to manage the intersection of investment, tax, and estate planning; and how to compete for better long-term investment returns against tax-exempt investors.

[The Complete Direct Investing Handbook: A Guide for Family Offices, Qualified Purchasers, and Accredited Investors](#)

Kirby Rosplock, PhD, 2017, *adapted description from Amazon.com*

This specialized guide and resource take you through pre- and post-considerations of direct investing. Several chapters are contributed by leading practitioners in the field who share their insights and experiences of using the direct investing strategy. Relevant case examples and research bring the material to life and shed light on the realities of direct investing globally. Additionally, you can discover a practitioner's lens to sourcing, screening, and ultimately deploying capital into direct investments individually or as a co-investor. Learn how to create a direct investment thesis and to strategically execute, monitor, and exit a direct investment.

▶ Wealth Management

[Wealth 3.0: The Future of Family Wealth Advising](#)

James Grubman, Dennis T. Jaffe, Kristin Keffeler, 2023, *adapted description from Amazon.com*

More than four decades ago, the field of family wealth advising began to emerge as a challenge to the tradition of caring only about the money. We now stand at the threshold to the next major transformation, strengthening the focus on family while shedding the fears and flaws that invaded beliefs about the rich. Written by three renowned experts, *Wealth 3.0: The Future of Family Wealth Advising* outlines how the field arrived at this point and what will be needed to establish a positive vision of family wealth. Through relatable stories and insightful recommendations, *Wealth 3.0* is a modern manifesto. It challenges family wealth advising to become the enduring, scalable, rigorous profession it was always destined to be.

[Wealth of Wisdom: Top Practices for Wealthy Families and Their Advisors](#)

Tom McCullough and Keith Whitaker, 2022, *adapted description from Amazon.com*

In *Top Practices for Wealthy Families and Their Advisors*, accomplished family wealth experts Tom McCullough and Keith Whitaker deliver a comprehensive collection of practical activities that members of wealthy families can undertake to ensure their continued success and development. This book provides top practices and tools on how to identify the factors that matter most when it comes to retaining and growing family wealth; invest wisely; raise the next generation; share their decision making through a prudent process; and incorporate charitable giving into an overall wealth strategy. It's an indispensable resource for managers of family trusts seeking to protect and advise their clients.

[Wealth of Wisdom: The Top 50 Questions Wealthy Families Ask](#)

Tom McCullough and Keith Whitaker, 2018, *adapted description from Amazon.com*

Managing significant family wealth is a complex affair, offering both opportunities and challenges. And those challenges have been on the rise with unprecedented transfer of wealth across the generations, shifting definitions of family, globalization, evolving family dynamics, increasing longevity, and massive wealth creation. By compiling the 50 most common questions and answers framed around nine categories—including investing wisely, raising the rising generation, and making shared decisions—this book is a practical, on-the-ground, how-to guide that will answer the key questions that every family of wealth wrestles with on a regular basis.

▶ Trust and Estate Planning

[The Beneficiary Primer: A Guide for Beneficiaries of Family Trusts](#)

Patricia M. Angus, 2020, *adapted description from Amazon.com*

Written by an expert who has more than two decades of experience working with families to create, administer, and benefit from trusts, this primer is a "go-to" resource for anyone who has been named as a beneficiary. The text incorporates a worksheet throughout that can help you organize information, thoughts, and questions, to set you up for a positive, productive experience. Key concepts are distilled to their essential elements. This primer is also helpful for anyone setting up a trust as part of an estate plan or for a trustee of a family trust.

[The Trustee Primer: A Guide for Personal Trustees](#)

Patricia M. Angus, 2015, *adapted description from Amazon.com*

An essential guidebook for individuals who have been named as trustee of personal trusts for family members or friends. With more than two decades of experience working with families to create, administer, and benefit from trusts, this primer is a must-read resource for anyone who has been named as a trustee. By breaking down complicated elements, this primer is a great starting point—or refresher—for understanding trusts and what it means to be a trustee.

[Family Trusts: A Guide for Beneficiaries, Trustees, Trust Protectors, and Trust Creators](#)

Hartley Goldstone, James E. Hughes, Jr., and Keith Whitaker, 2015, *adapted description from Amazon.com*

Marrying the practical and emotional aspects of family wealth, this book provides a hands-on primer that focuses on fostering positive relationships and structuring the trust appropriately for the situation and the people involved. Written by a team of experts in family wealth, this information is becoming increasingly crucial to the successful execution of a trust. From the book, you will learn what type of person makes the best trustee, how to be an excellent beneficiary, and the technical aspects that help you build a better trust from the very beginning.

▶ Lifestyle Services

[Saving the Family Cottage: A Guide to Succession Planning for Your Cottage, Cabin, Camp, or Vacation Home](#)

Stuart J. Hollander, Rose Hollander, and David S. Fry, 2021, *adapted description from Amazon.com*

Shared ownership of vacation property—especially when the co-owners are family members—can be fraught with problems. The idyllic dream of a cottage getaway can be shattered when co-owners’ emotions, financial concerns, and opinions on how the property should be used come into play. Fortunately, a solid plan that dictates how the property will be owned and managed can prevent squabbles over the family cottage.

[How to Find, Hire, and Keep the Right Domestic Professionals: The Household Employer’s Guide to Hiring Great Employees Who Will Stay for Years](#)

Aleksandra Kardwell, 2019, *adapted description from Amazon.com*

Over the years, Aleksandra Kardwell has learned a great deal about the needs of household employers, gaining an in-depth understanding of what works in domestic hiring. *In How to Find, Hire and Keep the Right Domestic Professionals*, she shares her experience, insights from thought leaders in the staffing field, and findings from a key employment research. This practical, hands-on book is filled with timely information and actionable advice to help you identify, hire, and keep the right people for your unique needs and preferences. Follow the advice in this guide and transform your rate of success in household employee selection.

[Passing It On: The Inheritance and Use of Summer Houses and Family Cottages + Workbook](#)

Judith Huggins-Balfe and Ken Huggins, 2015, *adapted description from Amazon.com*

Passing It On focuses on the sociological and family-dynamics involved in sharing real property rather than merely on the legal issues of estate reduction. It includes extensive quotes from over 100 summer-house heirs, about how they have managed to keep the property in the family over generations. Included is the companion guide: *How to Pass It On*, a workbook to help put into effect the practical aspects of Informal and Formal Operating Agreements, Practices & Policies, and other necessary agreements.

▶ Human Capital

[The SEO Optimized Job Description: A Complete Guide to Writing an Effective Job Description](#)

Jonathan Kidder, 2023, *adapted description from Amazon.com*

A recruiter’s role all starts with having intake notes and a well thought out job description summary. This is a vital part in recruiting and hiring a candidate for opportunity. Written for the recruiter looking to improve on their job requisitions, this book covers how job boards and search engines work, how to fully optimize a job description with SEO in mind, and how to use artificial intelligence and other tools to create better results. By following the strategies presented in this book, you’ll be equipped with the necessary tools to attract a larger and more relevant pool of applicants.

[The Ideal Team Player: How to Recognize and Cultivate the Three Essential Virtues](#)

Patrick Lencioni, 2016, *adapted description from Amazon.com*

In *The Ideal Team Player*, Patrick Lencioni tells the story of Jeff Shanley, a leader desperate to save his uncle's company by restoring its cultural commitment to teamwork. Jeff must crack the code on the virtues that real team players possess, and then build a culture of hiring and development around those virtues. Beyond the fable, Lencioni presents a practical framework and actionable tools for identifying, hiring, and developing ideal team players. Whether you are a leader trying to create a culture around teamwork, a staffing professional looking to hire real team players, or a team player wanting to improve yourself, this book will prove to be as useful as it is compelling.

▶ Technology

[The Coming Wave: Technology, Power, and the Twenty-first Century's Greatest Dilemma](#)

Mustafa Suleyman, 2023, *adapted description from Amazon.com*

With the coming wave of fast-proliferating new technologies, we are approaching a critical threshold in history where everything is about to change. Soon everyone will be surrounded by generative artificial intelligence systems (AI). As co-founder of the pioneering AI company DeepMind, part of Google, Mustafa Suleyman shows how these forces will create immense prosperity but also threaten the nation-state, the foundation of global order. As our fragile governments sleepwalk into disaster, we face an existential dilemma: unprecedented harm on one side and the threat of overbearing surveillance on the other. As a clear-eye guide, this groundbreaking book from the ultimate AI insider confronts the challenge of our times and provides a candid exploration of what the future may hold for us.

[The Age of AI: And Our Human Future](#)

Henry A. Kissinger, Eric Schmidt, and Daniel Huttenlocher, 2022, *adapted description from Amazon.com*

In *The Age of AI*, three leading thinkers have come together to consider how AI will change our relationships with knowledge, politics, and the societies in which we live. *The Age of AI* is an essential roadmap to our present and our future, and era unlike any that has come before.

[Managing Electronic Records: Methods, Best Practices, and Technologies](#)

Robert F. Smallwood, 2013, *adapted description from Amazon.com*

Many businesses are woefully unprepared to meet today's electronic records management (ERM) challenges and, as a result, remain exposed to significant legal and competitive risks. *Managing Electronic Records* gives professionals the tools to not only mitigate risk, but also position their organizations to leverage the many benefits that flow from effective records and data management. This comprehensive guide offers users both a strategic overview of current ERM issues and a practical road map for implementing specific ERM solutions.

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