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Anne Klein The Family Office Intern Certificate The

**GENERATIONAL LEGACY PLANNING | MARKET AND MEETING PLACE | FAMILY OFFICES AND ULTRA  
HIGH-NET WORTH FAMILIES, ADVISORS AND SERVICE PROVIDERS**

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# INTRODUCTION

## OUR LEGACY | CHANGING THE NARRATIVE

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Over the next 20 to 30 years, more than 1,000 billionaires are expected to transfer over \$5 trillion to their children.

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Generational transition brings new ideas for business, investment, and philanthropy.

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Importance of multi-generational planning, asset consolidation, diversification, family governance, and philanthropy.



# OUR LEGACY | CHANGING THE NARRATIVE



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Skills shortage + lost opportunities

# INTRODUCTION

## OUR LEGACY | CHANGING THE SCRIPT



About LDK and our vision

X More generational families

X More aligned solutions

X More opportunities for stakeholder network.



Name | Story  
| Networks

Global network

The name derived from a US family office connection and the founder's surname

Established 9 April 2024



Does your legacy matter? Create transformation

It should matter; knowledge is power.



Stories | Actions | Choices | Words

How you create your legacy matters



Why does it matter?

Being a steward of wealth creates change, for the greater good of humanity.



Different reports have various estimates, but \$59 - \$82 trillion could be transferred.

If the growth rate is two percent, charitable giving could reach \$27 trillion.

# Certificate Requirements

Driven by interviews

15 interviews

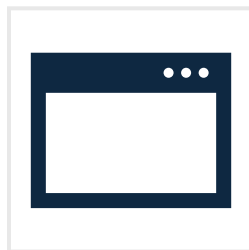
Mentorship

Specific reading and submission  
material

Specific Training requirements

Submission of





Subscriptions for family offices,  
trusted advisors and Service  
Providers

## WHAT DO WE OFFER?



Offer discounts,  
access to info,  
special events

# WHAT DO WE OFFER?

## A MARKETPLACE FOR GENERATIONAL PRODUCTS

Own books:



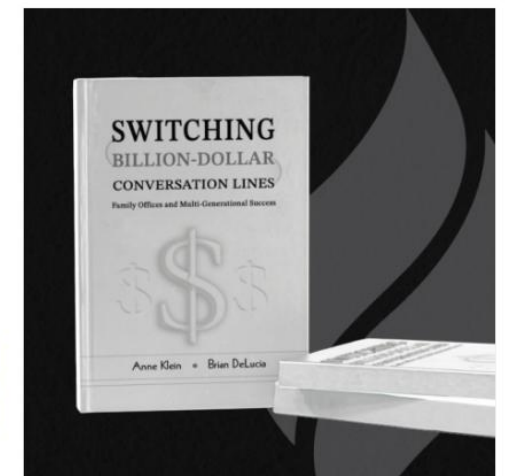
— Books

Philanthropy – a meeting place for hearts and minds



— Books

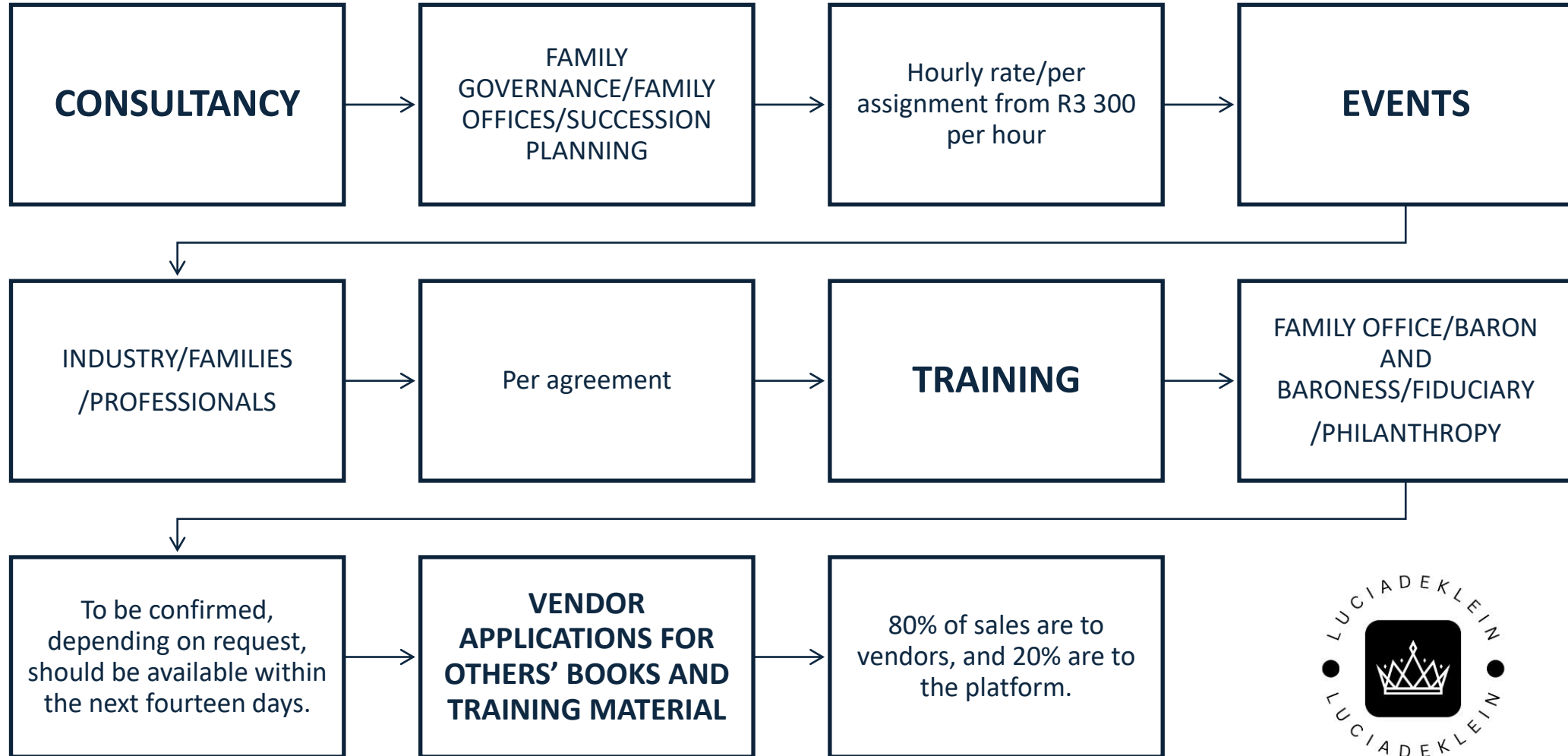
The Nine Golden Keys  
R330.00



— Books

Switching Billion-Dollar Conversation Lines

# WHAT DO WE OFFER?





# Thank you

*Networking is not about just connecting people. It's about connecting people with people, people with ideas, and people with opportunities.* Michele Jennae

Contact us to discuss Family Offices, Family Governance, Legacy Planning, and more!

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[anne@luciadk.com](mailto:anne@luciadk.com) 082 465 3533

