



## Facilitated workshops offered by Shaking the Tree

- Our half day, facilitated workshops are specifically designed for active small group discussions (with 10-50 participants) using one of four Living Case Studies we currently have in the DVD format.
- These sessions can be scheduled for a single cohort of individuals, or in a series to engage a larger number of participants via smaller breakouts. In addition, Shaking the Tree can also offer multiple workshops drawing on themes from several different Living Case Studies.
- Our seasoned facilitators are trained in a variety of disciplines and therefore can shape the workshop to explore the Living Case Study from the perspective that suits the client. The session can focus on specific areas of interest such as family decision-making/governance, business succession planning, risk management, conflict resolution, scenario planning, and family collaboration in advisor relationships as well as trust and estate planning/wealth management. Each session can be tailored to deliver more content-based learning or instead to illustrate tools for improving a family decision-making process, depending on the desires of the sponsor.
- Each Living Case Study has been created, reviewed, audience-tested, revised and filmed to enhance our workshop format. Our multi-disciplinary team of well regarded professionals has decades of experience in theater, family business/process and wealth management... and during the past 10 years Shaking the Tree has become a recognized leader in discussion formats.
- The workshop planning process begins with a client representative interview at least 3 weeks prior to the first scheduled session to allow us to design, in conjunction with the sponsor, the focus of the session and plan for logistics.
- The total cost of each 3-4 hour workshop is \$6,000-\$8000, exclusive of any travel expenses but including all preparation to tailor the event for the sponsor. Moreover, costs can be reduced via multiple workshops for the same client.
- Of the fifteen plays in our library, we currently have four adapted to the workshop format. These works bring to life stories of competing goals and dreams, family leadership and decision-making, communication and process, legacy, resilience and adaptation. The audience finds it easy to see how generations of a family can be affected by the pivotal transitions and missed opportunities that occupy only short spaces of time in the story line on stage.

For more on the four works including film clips, and on our 501(c)(3) organization and educational method, see [www.shakingthetree.org](http://www.shakingthetree.org).

**IT'S NOT JUST A STORY.** Each Living Case Study starts a conversation on what just happened, what could still happen, and what might have happened differently.