Podcast Episode 7 – With Jenny at the Family Assembly

This episode comes from the kitchen table at a country farm in NSW. It captures the reaction of a family coming together for their 1st family assembly.

Listen to the episode below:

[Download the transcript]

Podcast Episode 6 – At the kitchen table with Arun Abey

How much is enough?

In this episode I spoke with Arun Abey. Having authored the book 'How much is enough' and advised clients in relation to wealth for many years, Arun has deep insight into wealth, purpose and happiness He has a great perspective on how we need to educate and prepare our families to maximise wellbeing.

Listen to the episode below:

Download the transcript

Podcast Episode 5 – At the Kitchen Table with Paul Heath

This podcast is a way to share stories from families we support and our family advisor partners. These stories share a common theme – a critique of the idea that to be wealthy is not just about how much money you have but how you put your family's resources to use for future generations.

I partner with Koda Capital to deliver leadership and inter-generational wealth for families and have worked with the Koda CEO Paul Heath for over 10 years. In this episode I sat down with Paul to talk about the value of independent financial advice and how the industry will transform over the next 10 years. I particularly enjoyed hearing how families have created stewardship. The successes and the failures.

Paul has a significant amount of experience and the lessons he shares from these families are really insightful.

Listen to the episode below:

Download the transcript

Podcast Episode 4 – At The Kitchen Table With The Next Generation

Herding Cattle…

A very special family I've been working with closely, held their Family Council meeting in Bondi this week, which was a great opportunity to sit down with the next generation of the family.

Here we have 3 bright, thoughtful young adults reflecting on the past two years of experiences, challenges and successes in the development of their family office. In this discussion we considered goal setting in a family context, values, philanthropy and family dynamics. This episode gets to the core of our process and captures many insights for families considering this work.

Listen to the episode below:

Download the transcript

Podcast Episode 3 – At the Kitchen Table with Graham Jones III

Episode 3 in the series 'At the Kitchen Table' from Momentum Advisory Group

This podcast is a way to share stories from families we support and our family advisor partners. These stories share a common theme – a critique of the idea that to be wealthy is not just about how much money you have but how you put your family's resources to use for future generations.

My father, Graham Jones III was visiting us in Sydney this week, which made it easy to sit down at the kitchen table and talk through his story as executor of his father's estate.

Digging into the application of our family resources revealed a lot about my family story I hadn't heard before. His story is very much a traditional one, delivering the tax minimisation and asset distribution strategy laid out for him. But it's an engaging insight into the challenges that can come even with this basic approach. This story goes all the way back to the Louisiana purchase.

Listen to the episode below:

Download the transcript

Podcast Episode 2 – At The Kitchen Table With Alan Heath

Episode 2, in the series 'At the Kitchen Table' from Momentum Advisory Group

This podcast is a way to share stories from families we support and our family advisor partners. These stories share a common theme – a critique of the idea that to be wealthy is not just about how much money you have but how you put your family's resources to use for future generations.

In this episode I was fortunate to have Alan Heath join me at the kitchen table. Alan has 30 plus years working with families and family offices, and is a guest lecturer at the Harvard Business School Executive Education Program for families in business. I really enjoyed Alan's global perspective and his insights on family governance.

Listen to the episode below:

Download the transcript

Podcast Episode 1 – At the Kitchen Table with Momentum Advisory Group

Episode 1, in the series ‘At the Kitchen Table’ from Momentum Advisory Group.

This podcast is a way to share stories from families we support and our family advisor partners. These stories share a common theme – a critique of the idea that to be wealthy is not just about how much money you have but how you put your family’s resources to use for future generations.

We are a small family business helping families redefine what it means to be wealthy.
In Episode 1 we talk about our philosophy, what we do, who we are and what our work means to us, and the families we support.

Listen to the episode below:

Download the transcript