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:

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