

## Next Generation Service Offerings

### Mission Statement

ArchBridge partners with families of significant means to help the next generation develop the confidence, competence, and judgment needed to steward wealth with purpose.

### Education Philosophy

We believe stewardship is learned through practice, not assumed through inheritance. Complex financial and family dynamics must be translated into a practical understanding that supports smart decision-making over time.

We tailor education to each learner's age, life stage, and transition, connecting skills and context to family values and legacy. Our work is educator-designed and developmentally informed, shaped by experience with families across every stage of wealth creation and transfer—from first-generation founders to later-generation inheritors.

Our aim is not information alone, but sound judgment. We work directly with rising-generation family members and support parents in parallel, recognizing that lasting capability depends on both individual growth and a family system that reinforces it. Our goal is to help the next generation manage wealth with clarity, confidence, and a durable connection to what they inherit.

### Our Strategies



**Turn values into day-to-day decisions.** We help families translate what matters most into practical guardrails and build shared language around topics like “risk,” “responsibility,” and “fairness,” so conversations are clearer and less charged.



**Coach young adults toward confident stewardship.** We work 1:1 with young adults to strengthen judgment and real-world money habits, supported by a practical capability plan that builds skills, routines, and organization over time.



**Teach what's needed, when it's needed, and practice it.** We offer short learning tracks matched to life stages (starting college, job, first lease) and use real-world scenarios to foster understanding of habits and tradeoffs.



**Support parents with practical tools and steady expectations.** We help parents talk with their children about wealth in a developmentally appropriate manner: setting boundaries, calibrating support vs. independence, and using simple toolkits (conversation guides, decision templates, common scenarios) to stay consistent.



**Guide transitions and prepare families for roles and responsibilities.** We support key life transitions and provide clear education for beneficiaries and trustees specifically tailored to the unique needs of high-net-worth individuals and their families.