



**An internationally acclaimed author, educator, speaker, and**

**leading authority** in the area of wealth counseling, Thayer Cheatham Willis has been a licensed, practicing psychotherapist since 1990. Her primary focus is on facilitating a national and international clientele of inheritors and their families as they cope

with the psychological challenges of wealth. A child of wealth herself, born into the founding family of the multinational Georgia-Pacific Corporation, she brings to her increasingly important field a unique insider's perspective on contending with family dynamics as they relate to the mental and emotional challenges of wealth.

Accredited with an M.A. from the University of Oregon and an M.S.W. from Portland State University, Thayer is a licensed clinical social worker (L.C.S.W.) specializing in wealth-related issues. Thayer offers almost twenty years of hard-earned experience in a field she helped pioneer and dominates as one of its most prominent, foremost authorities. Working privately with a global client-base, she has helped over 500 inheritors and their families in four countries and two continents resolve wealth-related family conflicts.

**Noted for her eloquent yet down-to-earth, no-nonsense, practical approach**, Thayer has earned an international reputation as a renowned expert, charismatic educator, motivating presenter and inspiring keynote speaker. Her interactive approach to her specialty of relationship dynamics among families of wealth is based on field-tested methods that clarify and facilitate understanding, problem-solving and action-planning. Particularly proficient in assisting clients as they create pathways between generations, Thayer helps clients prioritize parenting tasks while instilling financial responsibility in younger family members.

**As a licensed authority, family wealth educator and a dominant spokesperson** for her increasingly vital profession, she has addressed thousands of men, women and children on the complex pressures, perils and pitfalls indigenous to the stewardship of wealth. Her audiences have ranged from intimate groups and private family retreats to executives of multinational corporations and financial organizations, including The Capital Trust Company Symposia, Campden Conferences' *The Family Wealth Management Conference*, *The Families in Business*

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*Conference* and *The European Family Office Conference*, and Stanford University. She was recently interviewed on ABC's *Good Morning America* and *20/20*. Thayer's expertise has been called upon to assist some of the most influential families around the world. Her programs are tailored to individuals and families of affluence, financial professionals, family office advisors and estate planning attorneys.

**A view of wealth from a new perspective.** This is the primary benefit to participants of Thayer's inevitably uplifting, invariably energizing, enormously motivating programs, seminars and keynote addresses. Distinguished by her trademark true-life stories which emphasize the heart and soul mandatory to successful wealth and abundance, she brings a unique insider's insights and experiences to bear on the mental, emotional and spiritual challenges confronting stewards of financial wealth.

**Thayer is the author of *Navigating the Dark Side of Wealth: A Life Guide for Inheritors*.** This invaluable handbook for families on the difficult journey to freedom beyond wealth serves, in her own words, "a largely invisible, often misrepresented, long underserved population that commonly struggles with the psychological challenges inherent in the stewardship of wealth." Thayer has written many articles for *Worth Magazine* and writes a quarterly newsletter, available on her website. She also has been interviewed for top financial publications including *The New York Times*, *The Wall Street Journal*, *Financial Times*, *The Business Journal*, and *Time Magazine*.



## Family Wealth Education **Keynotes** | **Seminars** | **Workshops**

The heartbreak and dysfunction of wealthy families who don't talk to each other. Alienated adolescents addicted to alcohol or drugs. Unhappy adults who don't work or hate the work they do. Aimless spendthrifts yearning for fulfilling lives. Major and minor crises which daily impede and diminish the unity and happiness of family members, begging to be addressed and resolved, but are only kept private and quiet. These are the critical areas of family interaction and communication, the raw materials to create solidarity and build strength within families.

Thayer's focus in working with wealthy families is on twelve essential disciplines to create purpose and foster unity in the family unit:

- Identity
- Values and life purpose
- Parenting
- Intergenerational communications
- Relationship skills
- Effective work with wealth management professionals
- Fulfilling work
- Personal financial responsibility
- Family mission statement
- Mentoring
- Philanthropy
- Health and Wellness

Participants in these programs, which are critical to family unity and well-being, will see wealth from a new perspective.

***Readiness reduces risk.***

## Family Wealth Education Programs

### Family Mentoring

Based on goals developed by the family and customized to fit each individual within the family unit, these programs are offered for the entire family or solely for those members who request them. Family mentoring caters to small family environments, from two family members to eight. Programs are available in three, six or twelve month formats.

### Family Retreats

Incorporating both education and fun, the educational topics for these productive yet enjoyable events are based on each family's greatest areas of interest. After the educational topic is chosen, the retreat will be customized for the family to ensure that family values and culture are addressed. The family retreat format, delivered in an appropriate, unique retreat location, accommodates five to forty family members, and can be planned for one to three days in length.

### Family Facilitations

Family meetings are often most effective with a facilitator, who unwaveringly serves the family's own agenda. These purposeful facilitations nurture and ensure a neutral, positive and safe interactive environment. Facilitated family meetings are for two to fifty family members, are held in a business meeting space, and are one to two days.

### Family Focused Keynotes and Workshops

Keynotes comprise a formal sixty to ninety minute message. Workshops provide interaction and engaging exchange. Each presentation inspires family members to view wealth from a fresh, happier and emotionally healthier perspective. The family presentation often serves as a fitting introduction to family retreats. Keynotes and Workshops can be planned for one family or many families at once. These events can serve twenty-five to a thousand family members, and are typically ninety minutes to a half-day.

*Because you are amazing you can achieve freedom beyond wealth.*

## Program Content

### ***Beyond the Silver Spoon: Parenting and Grandparenting Children in Successful Families***

A program empowering those on each generational side of inheritance issues and dynamics: parents, grandparents, younger and older offspring. Parenting children well is an on-going challenge under any circumstances, and wealthy families are no exception to this vital undertaking. This key program addresses the formidable demands of shepherding young family members through the emotional shoals of a life of privilege into a purposeful lifestyle of achievement and self-fulfillment. It is a task too consequential to be relegated to family advisors, nannies or school educators. Taking an informed look at the inherent challenges preparatory to identifying key roles and actions for all family members is a critical first step. This life-affirming session is filled with practical tools to guide the clarification, decision-making, and action-planning processes for structuring sound parenting goals. Thayer Willis, a pioneer in the intricacies of wealth counseling, will coach families in the skills indispensable to effective parenting and grandparenting under the pressures and dynamics of inheritance.

*This program will empower family members to:*

- Prioritize parental tasks
- Clarify and facilitate financial dialogue and literacy
- Motivate and guide family members in effecting meaningful endeavors and careers in their fields of choice

### ***Intergenerational Communication: Creating Pathways***

A program empowering wealthy families and individuals to communicate more effectively across generations. We all know how to communicate, but everyone can improve their interpersonal skills significantly. In wealthy families comprising several generations growing up under differing circumstances, barriers of misunderstanding may isolate family members from each other. In this stimulating session, through techniques easy to master, family members will learn how to view and experience each other through new perspectives and fresh points of view. Participants will emerge with the tools and skills necessary for the understanding, problem-solving, and action-planning to bring hope and promise for the future.

*This program will empower family members to:*

- Improve communication skills to sustain them in their most challenging situations
- Create interpersonal pathways between generations
- Teach love and respect for each other in ways that have been lost

## Program Content

### ***The Psychology of Wealth: Making the Best of a Good Situation***

A program empowering participants to navigate the range of challenges and solutions wealthy families encounter. For most of us, taking charge of the interpersonal psychology and dynamics of our own families is an innate art as well as a learned craft. Within the often volatile structure of wealthy circumstances, all of the inherent characteristics and dynamics are magnified. Senior family members and their professional advisors, working knowledgeably and in tandem, can play a pivotal role in identifying and coping with the challenges of stewarding wealth consistently and well. This session is filled with field-tested ideas that will clarify the process of understanding, problem solving, and action planning. Thayer Willis – a pioneer in the area of wealth counseling – provides individuals and families with the tools they need to create pathways among generations, to prioritize parenting tasks, and to facilitate financial literacy and competence in young family members.

*This program will empower family members to:*

- Expand their awareness of both the dark side and bright side of wealth
- Understand the true nature and obligations of wealth — beyond the financial — in the context of their families
- Know what steps need be taken to build healthy psychological and emotional bonds within the family

### **Program and Topic Formats**

*All topics and programs are customized in the following formats:*

- Keynote
- Breakout
- Half-day
- Full-day
- Multiple-day

***Courage is the signpost on the path to freedom.***



## Professional Clients and Audiences

Asset Management Advisors | The Burnham Institute | Campden Conferences: *The Family Wealth Management Conference*, *The Families in Business Conference* and *The European Family Office Conference* | The Capital Trust Company Symposiums | The Gathering Conference | ING Advisors | The Institute for International Research | Institute for Private Investors | Institutional Investor Events | Investment Management Consultants Association | Loyola University Family Business Center | MACG of Prudential Investments LLC | The Morgan Stanley Senior Consultants' Conference | NAPFA National Conference | Nantucket Capital Management Corporation | NMS Management | Oregon State University | Pacific Oil Conference | Piper Jaffray | Sigma Spring Convention | The Schmidt Investment Group/ CIBC World Markets, Inc. | Smith Barney | Stanford University | The Wealth Conservancy

And many more, names available on request

## Professional Associations

National Speakers Association Member, since 2004

*Shift your perspective: Look beyond wealth to freedom.*

## In the Media

A regular columnist with *Worth Magazine*, Thayer also has been called upon to provide expert clarification in national, international, regional, corporate and association newspapers, magazines and newsletters. A summary of Thayer's media appearances listed by category and chronological dates is provided and outlined below. Reprints of specific articles will be happily provided promptly upon request.

### Newspapers

*The New York Times*, January 6, 2008  
*Willamette Week*, December 19, 2007  
*Crain's Chicago Business Journal*,  
December 17, 2007  
*Financial Times*, December 14, 2007  
*The Miami Herald*, October 14, 2007  
*The Wall Street Journal*, October 21–22, 2006  
*El Heraldo*, August 5, 2006  
*The Washington Post*, December 24, 2005  
*The Roanoke Times*, April 2, 2003  
*The Wall Street Journal*, February 4, 2003  
*The Business Journal*, January 24, 2003  
*The New York Times*, February 12, 1995  
*The Business Journal*, April 27–May 3, 1992  
*The Oregonian*, August 27, 1990

### Financial Reports

*Kiplinger's Retirement Report*, September 2006  
*Kiplinger's Retirement Report*, March 2006  
*Horsemouth*, March 31, 2005

### Television

*Good Morning America*, January 11, 2008  
ABC's *20/20*, January 11, 2008

### Magazines

*Worth Magazine*, regular columnist 2008  
*Men's Health Magazine*, 2007  
*Letros & Lucros*, September 2007  
*Families in Business*, January/February 2007  
*The Monitor: The Voice of Investment  
Management Consultants Association (IMCA)*  
September–October 2006  
*Journal of Financial Planning*, August 2006  
*Worth Magazine*, July 2006  
*Bloomberg Wealth Manager*, May 2006  
*Worth Magazine*, August 2005  
*Worth Magazine*, July 2004  
*Converse College*, June 2003  
*Bloomberg Wealth Manager*, March 2003  
*Time Magazine*, July 17, 2000

## Endorsements | Praise

*“You did such a tremendous job! You exceeded my expectations and you were very well received by the families that were represented at our conference.”*

— Kenneth L. Schubert Jr., Owner, Garvey Schubert Barer

*“Thayer (Willis) is a gifted speaker and shares her personal experiences of growing up an heiress of the Georgia-Pacific fortune. She is a wonderful speaker in front of large audiences as well as intimate smaller forums. “She is one of the highest-rated speakers (based on our client’s comments) that we have had. She knows her stuff!”*

— Kirby Rosplock, Vice President Research & Development, Asset Management Advisors

*“CTC has had nothing but great feedback on the conference with many positive remarks about your session. It was terrific and it was obvious to all that you took the time to prepare and customize your presentation to specifically meet our needs.”*

— Elizabeth G. Glines SVP, Chief Marketing Officer, The Capital Trust Company of Delaware, Wilmington, Delaware

*“...described by one delegate as ‘you saved the best till last.’ ”*

— Suzanne Watts, Senior Conference Producer, Campden Conferences, London, England

*“Thank you again for coming to the rescue at the last minute, I feel your presentation was the best of the whole program. Your presentation was thoughtful and the practical tools really were important. The audience connected with you and felt, you really made the trip.”*

— Kristen Ahrens, Vice President, Asset Management Advisors

*“Thayer Willis is an engaging speaker, skilled at helping even those most uncomfortable in groups feel included and relaxed. Her life experience is an important part of her credibility, and her empathy.”*

— Dianna Smiley, The Oregon Community Foundation (OCF Philanthropy Forum Series for Professional Advisors)

*“Too many speakers just speak. Thayer actually engaged the entire group so that everyone left with an understanding of how to interact with their clients in a different and positive way. I think a few were also pleasantly surprised at what they learned about their own money attitudes: what money means for them in their personal lives, and how this can affect their work.”*

— Kevin Johnson, Program Chair, Association of Fundraising Professionals, Oregon Chapter



## **Fee | Schedules | Additional Information**

Fee schedules provided upon request. Thayer Cheatham Willis travels from Portland, Oregon.  
For additional information, please contact:

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*The most important values in life are caught, not taught.*