

## Recommended Reading

### Educating Responsible Owners

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**Consumed: How Markets Corrupt Children, Infantilize Adults, and Swallow Citizens Whole**  
*Benjamin Barber*, W.W. Norton (2007)

**Creating the Good Life: Applying Aristotle's Wisdom to Find Meaning and Happiness**  
*James O'Toole and Walter Isaacson*, Rodale Books (2005)

**Enjoy Your Wealth and Pass It On: A Blueprint for Family Wealth Enjoyment**  
*Bruce S. Udell*, Bruce Udell (2004)

**Family Business Ownership: How To Be An Effective Shareholder**  
*Craig Aronoff, Ph.D., and John Ward, Ph.D.*, Family Enterprise Publishing (2001)

**Family – The Compact Among Generations**  
*James Hughes Jr.*, Bloomberg Press (2007)

**Family Wealth – Keeping It in the Family**  
*James Hughes Jr.*, Bloomberg Press (2004)

**Great with Money: The Women's Guide to Prosperity**  
*Melissa Burke and Ellen Rogin*, Two Tangle Productions (2008)

**Inherited Wealth: Opportunities and Dilemmas**  
*John L. Levy*, BookSurge Publishing (2008)

**It Pays to Talk: How to Have the Essential Conversations with Your Family About Money and Investing**  
*Carrie Schwab-Pomeranz and Charles Schwab*, Three Rivers Press (2003)

**Just Enough: Tools for Creating Success in Your Work and Life**  
*Laura Nash and Howard Stevenson*, John Wiley & Sons (2005)

**Managing for the Long Run**  
*Danny Miller and Isabelle Le Breton-Miller*, Harvard Business School Press (2005)

**Navigating the Dark Side of Wealth: A Life Guide for Inheritors**  
*Thayer Cheatham Willis*, New Concord Press (2003)

### **Nudge**

*Richard Thaler*, *Yale University Press* (2008)

**Outliers: The Story of Success**  
*Malcolm Gladwell*, Little, Brown and Co. (2008)

**Perpetuating The Family Business: 50 Lessons Learned from Long Lasting, Successful Families in Business**  
*John Ward*, Palgrave Macmillan (2004)

**Positive Turbulence**  
*Stanley Gryskiewicz*, Jossey-Bass Publishers (1999)

**Preparing the Next Generation for the Responsibilities of Ownership**  
*Joline Godfrey and Sara Hamilton*, Family Office Exchange white paper (2007)

**Seasons of Grace: The Life-Giving Practice of Gratitude**  
*John O'Neil and Alan Jones*, John Wiley & Sons (2003)

**Step Wars: Overcoming the Perils and Making Peace in Adult Stepfamilies**  
*Grace Gabe and Jean Lipman-Blumen*, St. Martin's Press (2004)

**Strategy for the Wealthy Family: Seven Principals to Assure Riches to Riches Across Generations**  
*Mark Haynes Daniell*, John Wiley & Sons (2008)

**The Dilemmas of Family Wealth: Insights on Succession, Cohesion, and Legacy**  
*Judy Martel*, Bloomberg Press (2006)

**The Inheritor's Sherpa: A Life-Summitting Guide for Inheritors**  
*Myra Salzer*, The Wealth Conservancy Inc. (2005)

**The Legacy of Inherited Wealth: Interviews with Heirs**  
*Barbara Blouin*, Katherine Gibson and Margaret Kiersted, Trio Press (1995)

**The Millionaire Next Door: The Surprising Secrets of America's Wealthy**  
*Thomas J. Stanley and William D. Danko*, Pocket Books, Simon & Schuster (1996)

**The Soul of Money: Transforming Your Relationship with Money and Life**  
*Lynne Twist*, W.W. Norton & Company (2003)

**Trust Me: Helping Our Young Adults Financially**  
*Kenneth Kaye, Ph.D., and Nick Kaye, iUniverse (2009)*

**Wealth in Families**  
*Charles Collier, Harvard (2006)*

**Working with the Ones You Love: Strategies for a Successful Family Business**  
*Dennis T. Jaffe, Ph.D., Aspen Family Business Group, LLC (2000)*

**Your Money Or Your Life: Transforming Your Relationship with Money and Achieving Financial Independence**  
*Joe Dominguez and Vicki Robin, Penguin (Non-Classics) (1999)*

**Your Money & Your Brain: How the New Science of Neuroeconomics Can Help Make You Rich**  
*Jason Zweig, Simon & Schuster (2007)*

## **Raising Responsible Children to Become Responsible Adults**

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**101 Ways to Give Children Business Cents at Home, Work and Play**  
*Cindy Iannarelli, Business Cents Resources (1998)*

**Children of Paradise: Successful Parenting for Prosperous Families**  
*Lee Hausner, Plaza Press (2005)*

**Choking on the Silver Spoon: Keeping Your Kids Healthy, Wealthy and Wise in a Land of Plenty**  
*Gary Buffone, Ph.D., Simplon Press (2003)*

**Family Rules: Raising Responsible Children**  
*Kenneth Kaye, Ph.D., iUniverse, Inc. (2005)*

**Hats Off To You - Balancing Roles and Creating Success in Family Business**  
*Ernest A. Doud Jr. and Lee Hausner PhD, Doud/Hausner (2000)*

**Kids and Money: Giving Them the Savvy to Succeed Financially**  
*Jayne Pearl, Bloomberg Press (1999)*

**Millennials Rising: The Next Great Generation**  
*Neil Howe and William Strauss, Vintage (2000)*

**Prodigal Sons and Material Girls: How Not to Be Your Child's ATM**  
*Nathan Dungan, John Wiley & Sons (2003)*

**Raising Financially Fit Kids**  
*Joline Godfrey, Ten Speed Press (2003)*

**Raising Rich Kids**  
*Gerald Le Van, Xlibris Corporation (2003)*

**Silver Spoon Kids: How Successful Parents Raise Responsible Children**  
*Eileen Gallo, Jon Gallo and Kevin Gallo, McGraw-Hill (2001)*

## **Family Philanthropy**

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**Generations of Giving: Leadership and Continuity in Family Foundations**  
*Kelin E. Gersick, Lexington Books (2006)*

**Philanthropy's New Agenda: Creating Value**  
*Michael E. Porter and Mark R. Kramer, Harvard Business Review (November-December 1999)*

**Socially Responsible Investing: More Than Meets the Eye**  
*Verna O. Sedlacek, Commonfund Chronicle, Mission Matters (Spring/Summer 2007)*

**Strategic Giving: The Art and Science of Philanthropy**  
*Peter Frumkin, University of Chicago Press (September 5, 2006)*

**The World We Want: New Dimensions in Philanthropy and Social Change**  
*H. Peter Karoff with Jane Maddox, AltaMira Press (2007)*

**Wealth in Families**  
*Charles W. Collier, Harvard; Second edition (June 30, 2006)*

## Investment Process

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### **Advising Ultra-Affluent Clients and Family Offices**

*Michael M. Pompian, Wiley (2009)*

### **Against the Gods: The Remarkable Story of Risk**

*Peter Bernstein, John Wiley & Sons (1998)*

### **Behavioral Finance and Wealth Management: How to Build Optimal Portfolios That Account for Investor Biases**

*Michael M. Pompian, Wiley Finance (2006)*

### **Capital Ideas: The Improbable Origins of Modern Wall Street**

*Peter Bernstein, Free Press (1993)*

### **Creative Capital: Managing Private Wealth in a Complex World**

*Gregory Curtis, iUniverse, Inc. (2004)*

### **Foiled by Randomness: The Hidden Role of Chance**

*Nassim Nicholas Taleb, W.W. Norton & Company (2001)*

### **Foundation & Endowment Investing**

*Lawrence Kochard and Cathleen Rittereiser, John Wiley & Sons Inc. (2008)*

### **Global Bargain Hunting: The Investor's Guide to Profits in Emerging Markets**

*Burton Malkiel and J.P. Mei, Touchstone (1999)*

### **Hot, Flat and Crowded**

*Thomas L. Friedman, Farrar, Straus & Giroux (Hardcover 2008)*

### **Inside Private Equity: The Professional Investor's Handbook**

*James M. Kocis, James C. Bachman IV, Austin M. Long III and Craig J. Nickels, John Wiley & Sons (2009)*

### **Integrated Wealth Management: The New Direction for Portfolio Managers**

*Jean Brunel, Euromoney Books (2002)*

### **Investing With Your Values: Making Money and Making a Difference**

*Hal Brill, Jack Brill, and Cliff Feigenbaum, New Society Publishers (2000)*

### **Managing Hedge Fund Risk: From the Seat of the Practitioner – Views from Investors, Counterparties, Hedge Funds and Consultants**

*Virginia Reynolds Parker, Risk Books (2000)*

### **Managing Investment Portfolios: A Dynamic Process**

*John Maginn, Donald Tuttle, Jerald Pinto and Dennis McLeavey, John Wiley & Sons (2007)*

### **Pioneering Portfolio Management: An Unconventional Approach to Institutional Investment**

*David Swensen, Free Press (2008)*

### **Socially Responsible Investing: Making a Difference and Making Money**

*Amy Domini, Kaplan Business (2000)*

### **Tax-Aware Investment Management: The Essential Guide**

*Douglas Rogers, CFA, Bloomberg Press (2006)*

### **The Black Swan: The Impact of the Highly Improbable**

*Nassim Nicholas Taleb, Random House (2007)*

### **The Four Pillars of Investing: Lessons for Building a Winning Portfolio**

*William J. Bernstein, McGraw-Hill (2002)*

### **The New Rules of Personal Investing: The Experts' Guide to Prospering in a Changing Economy**

*Floyd Norris, Gretchen Morgenson, Allen Myerson, Times Books (2001)*

### **The Panic of 1907: Lessons Learned from the Market's Perfect Storm**

*Robert F. Bruner and Sean D. Carr, John Wiley & Sons (2007)*

### **The Portable MBA in Investments**

*Peter L. Bernstein, Wile (1995)*

### **The World Is Flat: A Brief History of the Twenty-First Century**

*Thomas Friedman, Picador (2007)*

### **Unconventional Success: A Fundamental Approach to Personal Investment**

*David Swensen, Simon & Schuster (2005)*

### **Wealth: Grow It, Protect It, Spend It and Share It**

*Stuart E. Lucas, Wharton School Publishing (2006)*

### **When Genius Failed: The Rise and Fall of Long-Term Capital Management**

*Roger Lowenstein, Random House (2000)*

### **Winning the Loser's Game: Timeless Strategies for Successful Investing**

*Charles Ellis, McGraw-Hill (2002)*

### **World of Risk: Next Generation Strategy for a Volatile Era**

*Mark Haynes Daniell, John Wiley & Sons (2000)*

