

Creating Family Meetings That Build Connection Across Generations

Families often devote tremendous energy to building successful businesses, managing investments, and creating opportunities for future generations. Yet one of the most valuable investments a family can make is creating intentional opportunities to come together.

At The Family Office at Synovus, we have the privilege of working alongside multigenerational families as they navigate the opportunities and complexities that come with shared ownership, wealth, legacy, and family relationships. Through this work, we have observed the many ways families create meaningful gatherings that strengthen communication, encourage transparency, and prepare future generations for their roles as stewards and future owners.

While every family is unique, many of the families we work with have discovered common practices that help make family meetings and retreats more engaging and impactful. Whether a family is planning its first gathering or looking to refresh a long-standing tradition, these ideas can provide inspiration for creating opportunities to connect, learn, and grow together.

Why Family Meetings Matter

The most successful family meetings are about much more than discussing business or investment performance. They create a space where the family can better understand their shared history, develop trust, learn from one another, and align around the future they hope to build together.

Intentional family gatherings often serve four important purposes:

Connect

Strengthen relationships across generations through shared experiences and meaningful conversations.

Educate

Build understanding of the family enterprise, ownership responsibilities and financial stewardship.

Engage

Encourage every generation to contribute ideas, interests and perspectives.

Inspire

Reinforce the values and purpose that guide the family's decisions.

Ideas for Meaningful Family Meetings

Sharing Stories Across Generations

Some of the most memorable moments happen when family members share their stories. Older generations can reflect on defining experiences, challenges and lessons learned, while younger family members can discuss their interests, goals and perspectives. These conversations often build appreciation and understanding across generations.

Defining a Shared Family Purpose

Many families use retreats to discuss the values and principles that guide their decisions. Conversations about family purpose, responsible ownership and long-term success can help create a foundation for future decision-making.

Educating the Next Generation

Family meetings are a natural opportunity to help younger family members better understand topics such as family history, investments, ownership responsibilities, philanthropy and governance. Education today can help build confidence for future leadership and stewardship roles.

Learning from Other Families

Some families invite members of another multigenerational family to share lessons learned and discuss common challenges. Hearing how others have navigated similar situations can spark new ideas and valuable conversations.

Balancing Purpose with Connection

A productive agenda matters, but so does simply spending time together. Shared meals, activities and informal conversations often create the memories and relationships that make family meetings meaningful.

A Resource for Your Family's Journey

Thoughtfully designed family meetings and retreats do not happen by accident. They require intentional planning, meaningful conversations, and consideration of how to engage multiple generations.

At The Family Office at Synovus, we enjoy partnering with families to help bring these gatherings to life. Whether a family is planning its first retreat or looking to enhance an established tradition, our Family Enterprise Services team can help develop an agenda, identify relevant topics and speakers, facilitate conversations, incorporate engaging activities, and support the planning and implementation process.

Our goal is to help families create meaningful opportunities to connect, learn, and prepare together—strengthening the relationships, values, and shared purpose that support multigenerational success.

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Common Practices That Support Successful Family Meetings and Retreats

Families that create meaningful and sustainable gatherings often consider these practices—

- 1 Start with purpose.** Clearly communicate why the family is gathering and what outcomes are most important.
- 2 Create time for connection.** Intentional retreats allow family members to step away from daily demands and focus on relationships, shared vision, and family values.
- 3 Design for all generations.** Consider the interests, experiences, and learning needs of different family members. Decide when younger generations can attend. Some families choose to bring the youngest generations and still allow them to participate in age-appropriate activities and learning.
- 4 Create space for meaningful conversations.** The most valuable insights often come from thoughtful questions and open conversations. Ask family members to submit questions in advance that they are curious about.
- 5 Mix education with experience.** Families tend to remember what they experience together more than what they simply hear.
- 6 Build consistency over time.** Regular family meetings create a rhythm of communication and allow trust, understanding, and alignment to grow.