



Milestones To Live By

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Sooner or later we all discover that the important moments in life are not the advertised ones, not the birthdays, the graduations, the weddings, not the great goals achieved. The real milestones are less prepossessing. They come to the door of memory. - Susan B. Anthony

My parents will be celebrating their 65th wedding anniversary this June, another special milestone to add to their full lives of many achievements, some large and some small, but all achieved with love and gratitude. Congratulations to them!

A milestone on the road used to be the indicator of how far you have come, and how far you have yet to go. As upright stones with engraved distance markers have been replaced in most places with reflective highway signs, the emphasis appears to have shifted from marking progress on the journey to simply providing direction.

Whenever we work with family members to record their legacy we think it is important to know where you want to go but also to take the time to note how far you've come. It

is essential to stop sometimes, reflect, and take stock of where you are, right now, and to mark the significant milestones that have been placed along the pathway of your lives.

Ancestry Research

One way to review where you've come from is through family ancestry research. Using the online resource of Ancestry.com is the place to start as they currently boast 34 million family trees and over 10 billion records online. A new service they offer is DNA testing (painless, through swabbing your saliva) as a way to match ethnicity and roots from all over the world and to determine more scientifically where your ancestors originated.

We have seen some family offices enlist a professional genealogist to uncover not just the names and dates of births and deaths from online resources, libraries, city halls and cemeteries, but other records as well— they may be expert in researching ship manifests for immigration purposes, marriage certificates, and other such archival documents.

Whichever way you choose, to uncover the lineage of the family ancestry is a first task, followed by trying to associate those names with photographs, press articles, video clips, memorabilia, and if possible always stories. Once this primary research is compiled the next step in recording one's legacy of the past is to look at milestones achieved, either for ancestors - a good place to start is with one's parents - and then to look at one's own. The purpose of all this eventually would be to determine the family values and beliefs, lessons learned, as part of the ethical will or Legacy of Values process.

This research would uncover a deeper background for the family to preserve, build, and pass on to next generations.



We are presently working with a family office that has taken all their archival information to a new digital level. We have helped them develop a family portal website, highly secure and protected, for only family members with usernames and passwords to access (there are close to 300 live members who live all over the world). Researchers including genealogists have uploaded the information to build a timeline of their ancestors, from the earliest known roots in mid-1800's in Eastern Europe to their arrival in North America and growth and success since the early 1900's. The website displays an in-depth family tree that can be sorted by family last name or by ancestor, with headshot photos posted where available.

To make it even more interesting, all sorts of memorabilia: birth and death certificates, ship manifests, business incorporation documents, old land deeds, etc., have been digitized for easy access by any descendant. We were able to record interviews of the elders in the family about the previous generations and then uploaded an edited and transcribed copy of them onto a video page where any family member can view them, anytime - with a high-speed Internet connection, of course!

The next phase planned for this website is for an intra-family office Facebook-type interface, so that milestones and family events can be shared and easily updated through family member individual posts. Pretty soon, a move to a new home, an engagement, or birth of a great-grandchild announcement will all come swiftly and securely to the inbox of every family member.

Piece in the Puzzle

Recently a newly forming family office contacted us - there had been a liquidity event of a part of the family business, which created the need to move the family records and financial affairs to a separate family office. The CEO that was hired contacted us on her first task, which was to preserve and record the family history and values, while the office's financial and logistical tools were being set up. We found this to be extremely viable, as this new milestone of the family was being established--the family office-- they were taking the time to review their

roots and preserve their non-financial legacy. Some family offices establish all their services and organization first, and then lastly as a final piece in the "puzzle", contact us to record their history, story and values. To preserve the history first when establishing an office is to honor the past and set the opening as a new milestone. A very smart move, on the path of existence...

Any which way it's done, whether through family ancestry or family history, milestones recorded digitally will always enhance the shared values and heritage of family offices for many generations to come. You can be sure, it is "relatively" (pun intended) easy and fun to do this work while "decorating" the family tree!

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