

How do you unite your family in a way that strengthens everyone – young and old – and allows for the responsible passing on of family assets, including wealth? There is no one answer. What we do know is that communication is key. In particular, the telling of family stories can have surprisingly positive effects on those who tell and those who listen, according to Marshall Duke, Ph.D., professor of psychology at Emory University for more than 30 years.

Why are family stories so powerful, and what's the best way to pass them on? In the Q&A below, Dr. Duke offers insights from his research.

Marshall, what does your research indicate about family narratives?

MD: Our research shows that children who know a lot about their family tend to be more resilient: higher levels of self-esteem, more self-control, better family functioning, lower levels of anxiety, fewer behavioral problems, and better chances for good outcomes when faced with challenges.

Why is that? Part of it is that family stories help children frame the question: "Do I come from the kind of family who would do X,Y or Z?" The X, Y or Z can be good, like helping someone in need, or bad like using drugs. This context goes with the child even when the family is not there. So this is very powerful.

Through family stories, children develop a sense of what we call the "multi-generational self," and the personal strength and moral guidance that comes with that. When something challenging happens, they can call on that expanded sense of self to pull through.

In your research, you used 20 questions to gauge how much children already know about their families (see boxes on pages 3 and 4). Can people use this "Do You Know" scale to guide their storytelling?

MD: These are good things to know. But you cannot take this list, make sure the kids know all the answers, and you're done. Storytelling is a process. It comes out of time spent together, with certain people doing the telling and other people doing the listening.

What kind of family stories should be told to children?

MD: Variety is good. Especially powerful are stories about a family's specific successes and struggles, and how the family bounced back from challenging times. This helps the younger generations see that they, too, can overcome adversity.

We have found that many family stories revolve around seven basic plots (see box at right). I feel strongly that it would be worthwhile for families to reach back into their individual and collective memories to retrieve stories of all seven kinds to pass on to the children.

Seven Types of Family Stories

1. **Overcoming the monster** – living through natural disasters, discrimination, war, etc.
2. **Quests** – leaving your comfort zone in search of something
3. **Voyage and return** – returning to normal life after being terribly hurt or injured
4. **Rags to riches, riches to rags** – Financial successes, financial failures
5. **Tragedies** – terrible things that happen in every family, with no upside
6. **Comedies** – stories that make you laugh (misunderstandings, coincidences, etc.)
7. **Rebirth** – big emotional and/or mental struggles that lead to new take on life



I would never say tell the kids everything. You must be able to frame the story positively and judge that your listener is able to absorb the story. There are some family stories that are not transmitted beyond one generation. Or do not get divulged until the children are 25, or even 40 or 50.

But I also know that if kids learn about difficult things, hard things that do not have a good outcome, what they learn is that we can live with that. And that's a good thing.

When should families tell stories?

MD: It's going to vary from family to family, but usually what we call the family's Prime Time. If not dinner, then breakfast. It could be in a car, on a trip. The biggest opportunities are special events like the holidays, birthdays, family reunions, where extended family is together and not getting pulled away by various things.

What if the older generations do not like to tell stories. How do you encourage them?

MD: It's really important for grandparents, as well as parents and others, to realize that telling stories is life-affirming. So there's mutual benefit here. It's not all a one-way.

Very often, as grandparents get older, they're more willing to talk about what happened to them. Parents should realize it's more powerful if the grandchildren ask; they're less likely to get turned down. I would also encourage giving the grandparents a notebook or something they can fill out, when they choose. Unlike emails and even video, written material is something that people tend to hold on to.

A genealogy service like Ancestry.com can provide a starting point, as well.

Usually one or two people in the family get hooked on researching and finding things to bring to family gatherings. A marriage certificate, the address of the great grandparents in Chicago, the first place they lived in Seattle. All sorts of stories can come out of that, as you go find the place on Google earth or even drive by.

Who should tell family stories?

MD: I'd say all the adults in the family should get into storytelling in whatever way they can. For two reasons. First is that everybody has stories that other people don't have. And second, people tend to have different versions of the same story. Grandma might say this was a terrible thing that happened but dad might think it wasn't so bad. This sort of thing teaches kids perspective.

Our research shows that grandmothers actually do much of the storytelling. But let's face it. Grandfathers, uncles, cousins are just as good. It's not any more potent to learn a story from your grandmother than other close relatives.

Be mindful that when you tell a story, you're always choosing to add value by simply selecting the story to tell, and also how you frame it. Two families may have gone on the exact same vacation. One can come back saying it was horrendous - bad flight, terrible hotel, etc. - while the other thinks all that was a great adventure.

The Do You Know Scale (Questions 1 - 10)

Do you know...

1. how your parents met?
2. where your mother grew up?
3. where your father grew up?
4. where some of your grandparents grew up?
5. where some of your grandparents met?
6. where your parents were married?
7. what went on when you were being born?
8. the source of your name?
9. some things about what happened when your brothers or sisters were being born?
10. which person in your family you look most like?



How can families start telling stories if they haven't already?

MD: Consider using an event when the extended family gets together, like Thanksgiving, to say something like: "You know how we have turkey and cranberry sauce every year? Here's another tradition: we're going to tell family stories."

Be sure to ask the kids, if they are old enough, what they'd like to know. Very often kids don't ask questions, either because they don't understand the information could be important to them. Or because they don't want to place mom, dad, grandma or grandpa into uncomfortable situations.

Do not mind if the kids roll their eyes at this. Just have them sit down and listen. If you do 30 minutes a day over Thanksgiving vacation, that's a lot of time. And do as little moralizing as possible. If someone is resilient in a story, the kids will know that. If good values are applied, they will know that.

Kids are entertained by stories they might read or see on TV. But when they hear stories about what happened to people in their family, they are strengthened.

What if grandparents and relatives live far away?

MD: There are now quite a few digital ways to see each other and talk, like on Zoom or FaceTime. This can happen as often as people want, and it's up to the parents to set it up. The grandparent can even say: "Here's my story for today; let me tell you about Uncle Bob..." Eventually, the kids might say, "Oh, you told me that already!" Now that should be music to the grandparents' ears; it means they're carrying the story.

What about in situations of divorce, adoption and single-parent households?

MD: Family structure does not really matter. If a child is adopted into a family, the stories in that family belong to that child just as much as a biological child. If there is a second marriage, and there are stepmothers and stepfathers, those stories belong to the children as well. It's just a richer set of stories. The more stories the kids can have about people dealing with situations in life that are not always great, the better.

Imbalance is OK. If you look at any family, you'll find that dad's or mom's side tends to predominate. I would not worry about that. In fact, we're not linking the stories to only what this family does. Your family encompasses mom, dad, stepmom, stepdad, neighbors. It's about learning how people close to you behave in situations that arise in life.

How can families use stories to foster self-motivation and guard against entitlement?

MD: Clearly, what is above and beyond storytelling is modeling the behavior. The older generation wants to remember that they're being watched. And the kids who are watching them are learning from them. With storytelling, I think it's very important to show the impact of actions. It's important to show that some actions take a long time to show

The Do You Know Scale (Questions 11 - 20)

Do you know...

11. which person in the family you act most like?
12. some of the illnesses and injuries your parents
13. experienced when they were younger?
14. some of the lessons that your parents learned from good or bad experiences?
15. some things that happened to your mom or dad when they were in school?
16. the national background of your family (such as English, German, Russian, etc.)
17. some of the jobs that your parents had when they were young?
18. some awards that your parents received when they were young?
19. the names of the schools that your mom went to?
20. the names of the schools that your dad went to?



results – 20, 40 or even 50 years. I think of this as planting almond trees, which don't mature for 70 or 80 years, but you plant them anyway. Then we have radishes, which I planted with my grandkids when they were very young, so we could pick them in three weeks.

We should tell almond stories and radish stories. Things that will mature quickly so we can see the impact. And also some other things that take much longer.

To kids in college or just starting out in life, what do you say?

MD: College-age kids can absorb stories at a pretty high level and at a higher rate. I'm sure that they've gotten some family stories. But if they haven't, I think they need to spend time with the grandparents. Or have things written down they can be given. It's not too late.

Kids have a responsibility TO their family. And they have a responsibility FOR their family. And the best way to understand how that responsibility applies to them is to know the story of the family, the reputation of the family and the values of the family. You can say it straight to a college kid: "Look, ultimately this falls on you." Someday, today's college kids might be making life and death decisions about the parents. So as parents, we have to teach them to apply values we think are important.

Is it OK to make up stories?

MD: No! You can embellish, emphasize or elaborate. We all do that. But fabricating a story is not a good idea. It's dishonest and eventually you'll get caught, especially as you get older and forget to whom you told what.

What else can families do foster a sense of shared identity?

MD: A family once wrote me that they decided to create a family motto based on a talk I gave. It took a long time, but they came up with one and even had it embroidered on a patch. And their motto is ALL FORWARD. If they're in the car and the kids are bickering, the dad says ALL FORWARD. And they stop fighting because they realize this isn't doing us any good.

Any family can do this. Everybody can come up with suggestions and you pick one to try for a month or even a year. If you like it, OK; if not tweak it. It's a way of saying "this is who we are," not only you but the extended family and the historical family. This can actually help children make good decisions in their lives.

And it's fun!

MD: Yes, very fun.



ABOUT LNW

Laird Norton Wetherby (LNW) serves exceptional families and individuals seeking to activate the full potential of their wealth. To help turn lifelong ambitions and multigenerational aspirations into reality, LNW brings to each client relationship a high level of care combined with deep expertise in wealth and legacy planning, investments, and trust and estate services.

Offering both RIA (Registered Investment Advisor) and trust services, LNW is committed to providing clients with unbiased, independent guidance and solutions. LNW has offices in Seattle, San Francisco, New York, Los Angeles and Philadelphia, as well as an affiliated trust company in South Dakota, empowering clients across the U.S. and around the world.

LNW is owned by employees and majority owned by Laird Norton Company, one of the longest-sustained family enterprises in the United States. To learn more, please visit LNWAdvisors.com

DISCLOSURE

The information presented herein is not intended as investment, financial or wealth planning advice; we offer advice only on a personalized basis after understanding the client's individual needs, objectives, and circumstances. The information presented herein does not constitute and should not be construed as legal advice or as an offer to buy or sell any investment product or service. Any accounting, business or tax advice contained in this presentation is not intended as a thorough, in-depth analysis of specific issues, nor a substitute for a formal opinion, nor is it sufficient to avoid tax-related penalties. Any opinions or investment planning solutions herein described may not be suitable for all investors nor apply to all situations. All opinions expressed are those of LNW and are current only as of the date appearing on this material.

Certain information herein has been obtained from public third-party data sources. Although we believe this information to be reliable, no representation or warranty, expressed or implied, is made, and no liability is accepted by LNW or any of its officers, agents or affiliates as to the accuracy, completeness or correctness of the information herein contained.