



Beginning Our Second Decade of Excellence in Live Family Dynamics Education

Shaking The Tree is pleased to announce its commitment to a new decade of fulfilling its core mission - utilizing storytelling to positively transform people's understanding of and relationship to wealth, family and society.

In its first ten years of existence, STT has nurtured and developed a unique form of interactive storytelling, the Living Case Study, which through the combined use of theater and expert facilitation generates amongst the audiences meaningful open discussions on the real impact of the choices made and actions taken by individuals and families with substantial resources. To date, the creative team, led by Managing

Artistic Director David Kersnar, has produced twelve professional one act productions of distinct merit – eight full length programs which focus on the intricacies of family dynamics and wealth and four varying length pieces which highlight charitable issues as part of our breakthrough series entitled “Conversations on Philanthropy.” These well-crafted live performances, followed by an interactive workshop with expert facilitation, have been extremely well received by the individuals, families and advisors of the family office, wealth management, professional and philanthropic communities.

Shaking the Tree
INTERACTIVE PRODUCTIONS

Honoring Jay Hughes

The Outsider premiered to rave reviews at the Spring gathering of the Collaboration for Family Flourishing.

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Filming *Stalemate*

Thanks to a generous grant from the Mary A. and John M. McCarthy Foundation, Shaking the Tree prepares to film *Stalemate*.

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Fox Fall Forum

On October 20th, Shaking the Tree will play the Fox Fall Forum in Chicago ...

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The Collaboration for Family Flourishing



In the Press

In June 2009, the Chronicle of Philanthropy (COP) highlighted the work of Shaking The Tree and specifically the play *Stalemate* in an article entitled “Charity Takes Center Stage” which describes how various non-profit groups use theatrical presentations to help them understand thorny issues.

In May 2009, to honor the career body of work produced by attorney Jay Hughes in the field of family wealth, Shaking the Tree developed and premiered, to rave reviews, a new play at the spring gathering of the Collaboration for Family Flourishing. The collaboration (CFF) is a three year old initiative that began with the desire to build on the insights expressed by Jay Hughes in his influential book *Family Wealth: Keeping it in the Family*. *The Outsider* was

written to explore themes introduced in Jay’s second work, *Family: The Compact Among Generations*. The gathering took place at Hamburger University, the Oak Brook, IL headquarters of McDonald Corporation. The creation and presentation of the piece was underwritten by the law firm of Kozusko, Harris, Vetter and Wareh, and Don Kozusko collaborated with Shaking the Tree on the creation of the characters and storyline.

Branching Out Into Film and Media

On October 23rd, thanks to a grant from the Mary A. and John M. McCarthy Foundation, Shaking the Tree will film its living case study, *Stalemate*. Created as part of the Conversations in Philanthropy series, the play explores all-too-familiar themes of exclusion and intergenerational strife in the heart of a family foundation.

Board member Stephen McCarthy first proposed the story, and collaborated in the creation of the piece. The play will be filmed in Chicago at the corporate headquarters of the Northern Trust Company which has generously contributed the use of its space, and will be directed by Shaking the Tree’s David Kersnar.



Conversations in Philanthropy

Stalemate

On the eve of an important foundation meeting, a family explores the meaning of legacy, and the hand-off of authority and trust between generations.

This summer, STT had the privilege of being engaged by Family Office Exchange (FOX) to produce a play for this year's 20th Annual Family

Forum, held in Chicago in October 20-22nd. FOX chose *Stalemate*, which emphasizes themes of trust, governance, and the importance of communications in establishing a legacy of giving through a family foundation. The presentation was held at the Chicago Sheraton Hotel. Our thanks to Vogel Consulting for underwriting the performance.



Philanthropy Indaba

Shaking the Tree co-founder, Maryann Fernandez, recently launched her new venture: **Philanthropy Indaba**, a unique consultancy that develops customized philanthropic journeys and internship opportunities for individuals and families of wealth. She uses her creativity and diverse network of contacts to help philanthropists and their families get out of the boardroom and into the field to envision the kind of engagement they would like to have with social enterprises. Several group trips are being planned for 2010.

Maryann is also continuing the successful **Indaba Dinner Series**, which brings together

philanthropists, social entrepreneurs, academics and activists for meaningful discussion on critical issues facing our communities. The dinner series was re-launched in June featuring special guest Dr. Arun Gandhi, Mohandas K. Gandhi's grandson. In November, she will be bringing the series to the San Francisco Bay Area in partnership with Sean Stannard Stockton, Tactical Philanthropy Advisors.

Maryann continues to work with the team at Shaking the Tree as a part of the creative Team Member.

**Indaba: (Zulu) a meeting of people from different tribes; a forum for the exchange of ideas.*

Future Plans

Shaking the Tree was created as an educational not-for-profit for the simple reason that we have always felt that it belonged not to us, but to the families and advisors that have worked with us in bringing these stories to fruition. It has been a unique and rewarding privilege to be a part of something that has touched so many. As we move forward in 2009-2010 with the creative and educational work of the foundation, we continue to plan new works on the inexhaustible themes of family dynamics, wealth and philanthropy. Our hope is also that, by utilizing new formats like DVD/streaming video we can reach audiences in new and better

ways that showcase the portfolio of living case study programs that so many of you have collaborated in creating. In the coming year we hope that we can continue to reach out to you our loyal supporters and industry colleagues for venues, ideas, and financial support to bring these worthwhile productions to an even wider audience!

Sincerely,

**The Founders and Board Members
of Shaking the Tree**

**Stephen McCarthy
Maryann Fernandez
David Kersnar
Don Kozusko
Elvira Orza Hnatov
Paul Mckibbin**



Family Office Metrics and Shaking the Tree

STT is also pleased to announce its collaboration with Family Office Metrics, a leader in strategy, operations and technology consulting to the family office and wealth management industries. Family Office Metrics will provide

administrative and technological support from their offices in mid-town Manhattan.

STT's newest board member, Elvira Orza Hnatov is a Partner at Family Office Metrics.

Consider Using us for Your Next Event

Event organizers have used the Living Case Study as a sponsored keynote around which other sessions focused on issues of wealth and family dynamics can be built. With many of our stories revolving around legacy and meaning, philanthropic organizations have found it to be a way to enhance conversation around challenging family foundation issues. Let us help in your next event!

www.shakingthetree.org



Shaking The Tree

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