

**A REFLECTION ON THE NATURE AND PRACTICE OF THE ROLE OF THE  
PERSONNE DE CONFIANCE IN A SYSTEM OF FAMILY GOVERNANCE;  
HISTORICALLY AND TODAY**

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During the past thirty-five years I have been privileged to serve many families as a *personne de confiance*. I was also mentored during 19 of those years by my father who served in the same capacity for fifty years. Together we have worked with five generations of many of these families. He and I often remarked about the special roles and responsibilities of the *personne de confiance* when he or she is entrusted by a family to serve them. We both recognized the deep spiritual rewards of such work if done without hubris. We have also recognized the powerful roles *personne de confiance* have played throughout history in assisting their patrons in governing civil society.

Reflecting on these discussions and on my personal experience, I offer here my observations on this important form of service; on its historical underpinnings and behaviors, on its importance to the current needs and development of families and their individual members and on its role in the development and betterment of the civil societies in which these families reside and in which, as Aristotle taught, such families form the basic unit of governance.

Aristotle, Archimedes, Confucius, Lao Tze, Cicero, Seneca, Thomas a Becket, Thomas More, Lord Burghley, Machiavelli, Gracian, The Count of Olivares, Richelieu, Mazarin, Talleyrand, Metternich, Bismarck, Hamilton, Van Buren, Colonel House, Harry Hopkins, Chou en Lai, Thomas Gates, Richardson Dilworth, John Gardner and John O'Neil, comprise a roster of the men whose lives personify the role of *personne de confiance*<sup>1</sup>.

Each in his own way served another, and none sought to displace the patron he served. Each saw in service to others a high calling and none sullied the life of the man or woman he

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<sup>1</sup> It is a great disappointment to me that I am not yet able to list a woman in this roster. Without any jocularly I know from my life's experience that behind many a great man is a greater woman. Perhaps the best individual metaphor I know for the extraordinary role women played in the role of *personne de confiance* is that of the Chinese empress who ruled China in the late 19<sup>th</sup> century from "behind the veil".

Equally in the Iroquois nation, the crones of the tribe selected the chiefs and could displace them. It was through their accumulated wisdom that the tribe was preserved.

Finally the minor masculine Greek god we know as Mentor, who Ulysses asked to mentor his son, Telemachus, a critical role for an *personne de confiance* and from whom our deep knowing about the importance of mentorship comes, was in fact Athena, the goddess of wisdom, in Masquerade.

served. Seneca, Cicero, Thomas a Becket and Thomas More each died for his ideals at the hands of the man he served. Aristotle, Confucius, Cicero, Seneca, Machiavelli, and Gracian each took what he learned in his life of service and chose to write it down to share with others. In each of these cases their wisdom remains with us today as fresh and useful in our times to our understanding of human behavior as it was when each of these men experienced the behaviors he catalogs.

Linking together the lives of these men we find some common characteristics that offer guidance to the twenty-first century *personne de confiance*.

First, all of these men were interested in excellent governance. Each in his time offered to whomever he served a set of principles of government that if practiced would offer success to the men and women he served and thus to the civil society within which he lived. Each recognized that society drifts into chaos unless all members share a clear understanding of their roles and responsibilities to each other. Each knew that the future of the man or woman he served depended on clear boundaries between their private and public lives regardless of the system of government of the community in which he or she is leading. As examples, Aristotle lived in the Athenian democracy, served as mentor to Alexander in an aristocracy and in his book *The Politics* offered useful observations on successful governance whether an aristocracy, or oligarchy, a Republic, an anarchy (pure democracy) or a tyranny (dictatorship). Cicero lived in a time when Rome was passing from a republican form of government through the anarchy of numerous civil wars, and into a tyranny. Cicero attempted to explain this process and the risks of tyranny it entailed, while arguing for the continuance of the republic and ultimately dying for his efforts at the hands of the new tyrant/emperor. Thomas More offered Henry VIII advice as

Chancellor of England, which helped the king govern well in the early years of his reign. Only when the king ceased to put the future of his country ahead of his own personal desires did that relationship break down. More lost his head and England fell into 150 years of civil war.

Second, all of these men were conservatives. Each had a skeptical view of human behavior and believed that government's highest purpose was the preservation of order, so that change as it occurred would be evolutionary rather than revolutionary. Perhaps the person who described this overall view best was the Chinese philosopher Lao Tzu who, when asked to describe the greatest leader of men, said, and I paraphrase, the greatest leader is the one who is not seen, is not heard and who is not felt, and yet is revered for a thousand years. Though skeptical of other men's behavior these men did not look down on others, rather they assumed that the natural self-interest of each man directed his decisions.

Third, each of these men, while highly ambitious, accepted with complete equanimity the roles and responsibilities of being number two. Each found a calling in service compatible with his highest ambition. This phenomenon of service to others in a role as a great number two has been greatly under-appreciated in modern times. We, in the West, have decided that leadership can only come from first achieving a position as number one. All of these men's lives give the lie to that proposition. Isn't it fascinating that in many cases the number two is the man history remembers, while the man or woman he served is less well known? It is especially surprising when we add the fact that each of these men actively practiced the art of service and saw to it, during the life of the person he served, that his patron got the credit for the *personne de confiance's* successful acts.

To sum up, what characteristics link these *personnes de confiance*?

- (1) An interest in the art and practice of governance;
- (2) A belief in orderly evolutionary change;
- (3) A skeptical view of human behavior, and;
- (4) A willingness to subordinate personal ambition to the higher calling of service to another

With these common traits of great number twos in mind what I have observed about this role of *personne de confiance* as it applies to serving families toward long term success is:

First, on governance, it has been my privilege to act in a role of *personne de confiance* for a number of families as it was for my father before me. To be in such a position of honored counselor has been for both of us a privilege we deeply treasured. These positions have afforded us opportunities to observe the evolution of families through the practice of our art, and enabled us to assist these families, and their individual members, in their growth while, at the same time, achieving our own ambitions and callings to be *personnes de confiance*. In this role we found the offered wisdom of the *personnes de confiance* cited earlier and their shared experiences to be our guides.

In my case, with the families I serve, teaching them how to set up systems of governance to achieve excellent joint decision making over a long period of time *founded on these great men's wake*, has been especially rewarding personally and more importantly than my own personal satisfaction, I have observed, that successful family governance has lead directly to the achievement of significantly higher orders of personal happiness among the individuals within

these families when their families governance system achieved higher levels of function<sup>2</sup>.

What process do I use in helping families govern themselves? First, every family is made up of the complex personalities of all its individual members. As a *personne de confiance*, I try through the observation of and dialog with, each family member to seek to determine how these multiple personalities coalesce to create the personality of the family. I seek to learn where the family's strengths lie and where its weaknesses are. When I feel that I understand a family's character, its process, and, its strengths and weaknesses, I attempt to mentor its leaders, based on what I have observed, to appreciate in the context of my dialog with their individual family members, that if they do not offer leadership which enhances the individual life journeys of each of their family members, they will quickly have no one to lead and the family's governance system will fall into chaos. In this mentoring role, I try to offer them, as objectively as possible, my observations on their character as a family and what I perceive to be the individual goals of each of their family members. Finally, I offer them suggestions on how to assist each family member in achieving his or her personal happiness by finding the educators and mentors necessary for the growth of his or her individual human and intellectual capital. When I serve a family in the evolution and practice of a system of family governance which enhances the lives of the individuals who make up the family I am practicing the first of the characteristics of an *personne de confiance*'s assistance to a family, coaching in the art and practice of excellent

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<sup>2</sup> In other "Reflections" and in my book, *Family Wealth: Keeping It in the Family*, I discuss my view that the mission of every family intending to overcome the universal cultural proverb "Shirt sleeves to shirt sleeves in three generations" must be to enhance the individual pursuits of happiness of each of its members if it is to dynamically preserve itself. It is in this context that I will use this phrase through this *Reflection*. enhance ≡ the individual pursuits of happiness of each of its members if it is to dynamically preserve itself. It is in this context that I will use this phrase throughout this *Reflection*.

family governance toward the long term success of that family.

Second, in my experience successful change is an evolutionary not revolutionary process. Preservation of basic order and core values is a family virtue. The good professional enables families to successfully evolve from one generation to the next. All too often today, I observe professionals who offer advice to their clients based, not on what their clients need for orderly long-term change to meet new conditions, but, rather, on a product which the professional has developed and wants to sell. This conduct is the antithesis of the behavior of a true *personne de confiance*. Families are in the business of overcoming the universal cultural proverb, *shirtsleeves to shirtsleeves* in three generations. Given current demographics it will take one hundred fifty years for three generations of a family to be born and die. Thus, it will be one hundred and fifty years from now before anyone can know whether the family has overcome the first hurdle to its perpetual, never-ending war against the proverb. A professional who wishes to be a *personne de confiance* rather than a salesperson has to face this truth. No product he or she can dream up will possibly meet the challenges of the world even fifty years from now much less one hundred fifty years from now. Only the timeless wisdom of how families have successfully evolved as it, has come down to us from the great *personnes de confiance* can truly help a family meet and overcome the multiple challenges it will face over such a long time horizon. In my opinion, families can achieve success in retarding the entropic effect of the proverb, only when their professionals are willing to acknowledge that they can participate in only a small part of the hundred fifty year cycle of a family's history. They must recognize that it is their service, wisdom and understanding of the need for orderly change and the arts and practices that will promote it that these families seek in their efforts to retard the effects of the proverb, not products

whose shelf lives are much too short to be truly helpful.

Third, true counselors offer to clients a healthy and loving skepticism about others' behavior. They never fail to make clear any self-interest, after all, the *personne de confiance* is just as human as everyone else. Skepticism about human behavior is not about viewing life through dark anxious glasses, or seeing human beings as fatally flawed. It is rather viewing, with compassion, the truth of the human condition. It is believing in and actively supporting each individual's struggle, as an evolving life-form, to achieve deep happiness, while doubting that anyone in this life-time is going to achieve it. *Personnes de confiance* bring to the families they serve a deep awareness of human behavior and the truths and consequences that such behaviors both represent and exhibit. Often in the families I work with, their financially privileged positions have isolated them from many human interactions because they are often taught that they must not trust others since the world wants to take their financial wealth away. Also, all too frequently, younger generation members of these families have been abandoned emotionally by their parents and exhibit the behaviors associated with abandonment in their inter-personal relations. The true *personne de confiance* brings to these clients a worldly-wise view of human behavior and a gentle mentoring in the arts of human interaction. He or she helps these individuals overcome their inability to trust others or their senses of isolation and abandonment.

Fourth, and perhaps of the greatest importance to the calling of the true *personne de confiance* is the ability to naturally subordinate his or her ambition to the service of another, in this case a family and its individual members. As I have grown older, and, I hope a little wiser, I have come to understand that it is the heart, not the head, that is our dominant decision maker. Recently I was privileged to join a small band of journeyers who spent six days in a deep



mediation to see what we could learn from each other about the living of life. At the end of this profound experience each of us committed ourselves to live the rest of our lives on the principle of heart-based living, learning and leadership. In essence, we are committed to the proposition that it is through the hearts' wisdom and leadership that we can find the answers to our questions.

This insight came to us at a time when the idea of the Western Enlightenment that the head or intelligence is the only true advisor is being challenged by the new biology of mind-body integration and its Eastern philosophical underpinning. This is not to say that the heart's wisdom offers certainty but rather that the reintegration into our post-modern lives of heart-based living, learning and leadership offers a possible new route to answering twenty-first century life's new questions.

Already in my work with families I am employing these techniques in seeking better answers to what motivates and guides each family member in his or her personal journey. Understanding as I hope you now do, the nature and history of the role of *personne de confiance*. I move now to the question:

In what ways then and how today are the special attributes and skills of the *personne de confiance* in the "helping professions" of law, medicine and education relevant to the lives of families and their individual family members?

In the lives of families, the few outsiders they honor by their trust and invite into their lives have an inordinately high influence on their decisions and on their values. What do families find today when they seek to give their trust to outside professionals? Unfortunately, not what they expect. In my opinion, and the opinion of many of the families I serve, the great professions

have lost their callings of service or callings of the heart, thus lost their roles as *personnes de confiance* in the pursuit of personal profit. In what ways in the beginning of the twenty-first century do I believe the professions of law, medicine and education have lost their way in truly serving as *personne de confiance* to their clients, patients and students?

First, the law. My profession has hit such a low point of morale that the ABA reports that new disciplines of psychotherapy are being developed to help. This loss of morale grows out of a loss of a calling to service replaced by a call to profit exemplified by the lawyer as seller of products rather than as honored provider of service. The law is, and has historically been, a calling of service to help solve the problems of people who, as my father taught me, either do not have the knowledge or, more often, the courage to solve a particular issue. But it is the call of financial reward, not the call of service, which motivates many members of the legal profession today and which, concomitantly, warrants clients looking at us as sellers of time, as commodity merchants not different from sellers of soap, rather than as *confidants* and wise counselors consumed by the calling to help.

As a terribly sad example in the field of private client work, my field, I observe many legal professionals meeting their personal financial and ego goals by masquerading as family counselors while conducting an adversarial practice feuding with the Federal Government about taxes, using the families they represent as the financial means to this end. This is doubly doubtful behavior when these same families so badly need the counseling they seek to fight against their true enemy, the entropic<sup>3</sup> effects of the proverb cited above. Families need

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<sup>3</sup> Entropy, for the purposes of this Reflection, is defined as the process of decay of the human, intellectual and financial capitals of a family over three generations in the same process of decay as occurs in physics when energy materializes and then through frictions gradually dematerializes back into energy.

counselors not product salesmen if they are to meet the problems of the 150 years of transitions they will face to overcome the proverb. Without lawyers as true counselors the road is made far more treacherous.

In the field of allopathic medicine the technological fascination of doctors for the engineering complexities of their new machines and their personal profit goals have overcome for many the ability to be truly invested in the health of each of their patients. Given this misunderstanding by physicians of their true callings it is not surprising that a large number of Americans (as noted by Congress in a new department of the National Institutes for Health) use alternative medicine, in which they perceive they are individually cared for and about, and that very few see any need to advise their allopathic physicians that they are doing so.

What can history offer the modern medical *personne de confiance*, the great men and women we seek to heal our minds, bodies and spirits? While I am not a doctor of medicine, I am a student of history and of ideas. The ancient Greek, Chinese, and Indian civilizations all offer great wisdom, in their medical philosophies, on the need for treating the whole human being. Each of these traditions define treatment as finding the “dis-ease” of the patient and treating it. Clearly a pro forma eighteen-minute appointment can’t reach this level of illness, nor can a machine intuit it. The great axiom of medicine is “Do No Harm” and the great axiom of living a life is “Know Thyself”. It seems to me that a modern medical *personne de confiance*, seeking to truly heal his or her patients, must treat dis-ease with the humility of doing no harm, and with the deep understanding of what it is to be a healer of the whole person offered by the wisdom traditions not with the hubris of technology,. Please understand I am deeply moved and applaud the vast reduction in human suffering achieved by twentieth century biological and technological

research and invention, however, I believe that it is in the intuitional appreciation of the whole individual patient that the role of a medical *personne de confiance* comes into play. It is at this intersection where I believe twentieth century medical professionals have not served their patients well. I hope that this new century will see a blend of the medical new with the wisdom traditions of old to better serve human beings and the families of which they are a part.

Turning to the academy and the education profession. Today the temples of academia, are ruled by research, not teaching, the ivory tower rather than the lecture hall. Traditionally, the education professions' main purpose was to educate by teaching and the great academic *personnes de confiance* were those men and women who measured their success by the intellectual awakenings they gave birth to in their students.

Today in most of the institutions of higher learning it is research, not teaching, which leads to promotion and distinction. The essence of research is personal. It is the individual joining of a mind and a heart and is, by its nature, insular. Today especially in academia the scientist researcher is "king of the campus" but rarely seen by any student on it. What worries me particularly about the issue of science in the academy is that while it argues it is collaborative, its most impressive gains are achieved through individual insight. The researcher, as I observe her, seeks the private theater of the laboratory not the public theater of the classroom. Such a life leads sometimes to creativity but frequently to disjunction with the world. Moving within the academy from science to the humanities, the bibliophile is today ever more isolated, for without the books he writes and struggles to publish he perishes. Whether scientist or humanist, time in the classroom is perceived by him or her as time taken away from his or her future. Much is said today in the academy and in the public sphere about the need for community and for an active

civil society, and much hand ringing occurs over the “fall-off” in the quality of students and of the communities from which they come. I wonder why? Could it be because the people whose voices are loudest on these subjects have failed the human community as its teachers about civic life by insulating themselves from the human community in the “gated communities” their lives in the academy as consultants to big government or big business or big science or big philosophy exist in?

A true educator as *personne de confiance* to his or her clients believes in his or her ability to grow great human spirits through the dissemination of the world’s knowledge to the hearts and minds of its people. Where, sadly, have such great educators gone? In the academy, as with the law and medicine, it seems to me, ego, money and a special elitism have taken the role of the educators as *personne de confiance*, from its professional core, the education of students and especially as evolvers of their students intellectual spirits, and reduced it from service to people to service to self.

Families seeking to overcome the “shirtsleeves” proverb need the active teaching arts of those great minds called to service through being educators. When the education profession ceases to honor teaching as its highest calling, families and the individuals who make them up lose a high art of paramount importance to their ability to grow their human and intellectual capitals to their highest potentials as they lose access to the most creative minds and those minds’ special gifts for visioning, the past, the present and the future. The professional as educator, as active teacher, is a role for *personnes de confiance* in all professions but its loss in the academy is its greatest loss to families and the societies of which they are a part.

Families deserve from their trusted counselors whether lawyers, doctors or educators,

advice that represents the subordination of the personal ambition of the professional to the provision of service to their families. As in the biographies of the men discussed above the modern *personne de confiance* finds his or her calling in service to others. This is “Work” of the heart and of the intuition far more than it is of intellect. It is based on seeking to know the whole person we serve and the entire environment in which he or she exists and then to a commitment to that person to assist in his or her evolution of his or her human and intellectual capital to their highest degrees.

Turning now for a moment to the larger community that *personnes de confiance* serve. In my opinion, for a civil society to be successful its professionals must provide to that society, healing and humane preserving energy toward those societies successful and orderly dynamic evolutions. Biology and cosmology ask us to imagine that the energy that creates life and permits it to flourish exists in the universe in a tiny space just above *thanatos*, stasis or pure-order, where nothing can live, and just into *eros*, dynamism or pure chaos, but not so far into chaos that it is destroyed. In all historical and pre-historical societies the professions, including the priests and priestesses, have been given the responsibility within such societies to preserve this life generating space and to encourage the entry into society of this special energy. Perhaps the essence of this energy is best understood through the metaphor provided by Hinduism. The enlightened Hindu sees one god in three essences. *Brahman*, the god whose essence inspires life, *Shiva* who is at all times the essence of creation and destruction and *Vishnu* whose essence is preservation. Once *Brahman* has inspired life it is left to *Shiva* and *Vishnu* to maintain life. At the split second before *Shiva* in his essence as destroyer is about to bring the end of life, *Vishnu* reaches in, preserves life, and tosses the new life back to *Shiva* in his essence as creator. It is

Vishnu's act of bringing the healing humane energy into life that epitomizes the true preserver of life. When the professionals in a society cease to perform this function, often because they begin to act only in their own self-interest, societies have frequently broken down and become grist for the historians. In my opinion, as we enter the twenty-first century, Western Society is at risk that its professionals are no longer acting responsibly toward their Vishnu role as preservers of societies sacred life generating space, as their individual goals overtake their goals as *personnes de confiance*. In the group meditation I mentioned earlier it is this "Vishnu" energy that constitutes heart-based living and learning since it is here, in our deepest intuitions, where the preserving energy of Vishnu lies.

It is my hope that the twenty-first century will see a re-commitment of the professions to their true calling, the calling of service to the deep human needs of the individuals and families they serve and to the societies of which they are a part. In my opinion, without a re-dedication to the ideals of Aristotle, Confucius, Seneca, Machiavelli and Gracian, may I also say Hipocrates and Galens, the individuals and families and the societies in which they live are in real danger. If professionals will re-dedicate themselves to their true callings to service the chances of decline will diminish. In such service, in my opinion, lies a part of the answer to the preservation of our Western society and the possible happiness, in the Aristotelian and Jeffersonian senses, of its members.

If those called to be *personnes de confiance* accept this role it is equally imperative that their clients, all of whom I see and define as their *patron*<sup>4</sup>, appreciate what this role means. The

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<sup>4</sup> I am using the term *patron* in its highest calling as exemplified by Lorenzo di Medici, whose gift for bringing into his life men and women of wisdom who were enabled by his gifts to transcend themselves and in turn enlighten him and the society which he lead. All great number 2's are created by their patrons and then through their enlightened

wise patron will understand its importance to his or her own and his or her families' life-long learning. The wise patron understands that a family's prosperity lies in the health both human and intellectual that will flow from a positive relationship with such a person. Respect and honoring of the relationship between patron and *personne de confiance* is necessary for learning to take place.

Knowing that the true *personne de confiance*'s personal journey of service begins with a willingness to subordinate himself or herself to his or her patron offers the patron the means to accept such a gift without fearing loss of place or of competition. In the reciprocity of gratitude, one to give his or her service and the other to provide a means for doing so and for the respect of the gifts of such service in an enhanced life lies the essence of the relationship. Both parties benefit and, spiraling upward, both spirits grow.

We, who are called to be *personnes de confiance*, have a duty to ourselves to perform this work well if we are to achieve our own individual happinesses. If we continue to lose our way by serving our personal profit goals rather than serving our deepest intuition, our call to serve, then we lose ourselves, and in losing ourselves we lose the cherished title so honored by history in the lives of the great men discussed here, the title of *personne de confiance*.

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service uplift the life of their patrons. Such is the spiral of discovery and creativity that is the life giving energy great professionals called to service generate through their relationships with their patrons.



