

— Centerprising Journey —

Live Guided Experiences Online

Family Office Design: Strategic Command for Family Wealth Creation

— JOURNEY DESCRIPTION —

Family Office Design: Strategic Command for Family Wealth Creation

Family offices are set up to help families manage their wealth, possibly including investing, tax planning, managing ownership vehicles, and assisting family members with financial management needs. It might provide professional staffing support to the family governance.

Whether you are starting a new family office, rethinking your existing one, or trying to learn about your family's existing family office, this journey helps you examine how the family office can play a key role in the family's wealth creation.

6 or 12-week expert-guided journey online

US\$ 3,800 per participant for 6-week journey with weekly dialogue
US\$ 4,800 for 12-week journey with dialogue every other week

Who is this journey for?

- Family Wealth Creators who want the core family organization to be more supportive of innovation.
- SeniorGen who see the need to deploy more family talent to take advantage of disruption and avoid being destroyed by it.
- RisingGen who see the imperative to engage with external talent especially around disruption.
- Trusted Advisors of the Family who think that it is critical for the family to invest more in innovation driven ventures.



What is the journey experience?

Our philosophy is to provide bite size, guided, practical learning in a directed way that leads to developing concrete, implementable action plans.

Initial articulation of goals. At launch, we hold a 1-on-1 session with you to help you articulate your challenges and turn them into a list of solvable, prioritized problems. You select one problem to address. Then focus on developing an action plan for that problem thru the journey.

Insights into Family Office Design. We send you weekly learning materials. They provide frameworks and case samples to direct your data gathering, analysis, and action plan design. We hold weekly 1-hour dialogues in small groups to review learning highlights, discuss your reflections, guide your action planning, and for the group to share experiences.*

Customized creation of personal action plans. At the end of the journey, we hold a 1-on-1 session with you to polish your action plan and ensure that it can help you achieve concrete goals.

* We would answer any questions on learning materials and provide feedback on self-reflections + action plans in between dialogues

Curriculum for Journey

Family Office Design: Strategic Command for Family Wealth Creation

1 WEEK 01

Functions of Family Office

- a. Discover the range of ways that business families around the world are using family offices to meet their needs

2 WEEK 02

Family Office Structures

- a. Examine the major types of family office structures and how they integrate with operating businesses and governance structures within the family enterprise

3 WEEK 03

How Family Office Supports New Wealth Creation

- a. Explore how the family office can provide systematic support of the key elements of new wealth creation— innovation + entrepreneurship and accumulation of four capitals (financial, social, human, and intellectual)

4 WEEK 04

How Family Office Can Support the Family

- a. Discover the range of ways the family office can support family governance, especially family education and welfare

5 WEEK 05

How Family Office Can Support the Operating Business

- a. Discuss how the family office can support the operating businesses— including oversight that family board members exercises and influence family exerts

6 WEEK 06

Your Vision for Your Family Office

- a. Develop your proposed changes to the current family office or elements of design for your new family office

Family Office Journey will be adapted to the needs of journey participants

- ❖ Family Office designs vary greatly to meet each family's differing needs and reflects each family's unique internal dynamics
- ❖ The evolution of Family Office functions reflect the changing needs of the family group it serves
- ❖ Families face common challenges and their solutions to addressing them can be quite different
- ❖ Herein is the benefit of peer dialogues around this topic

The Journey will focus on facilitating dialogue among small group of trusted peers around shared challenges

How to join:

- ❖ If you are interested in registering for this journey, please visit our website at

www.centerprising.io

- ❖ Journeys start monthly
- ❖ Journey Fees Per Participant:
 - US\$ 3,800 for 6-week journey with weekly dialogue
 - US\$ 4,800 for 12-week journey with dialogue every other week
- ❖ For inquiry, please click on the button below or send us an email:

[INFO REQUEST](#)

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