



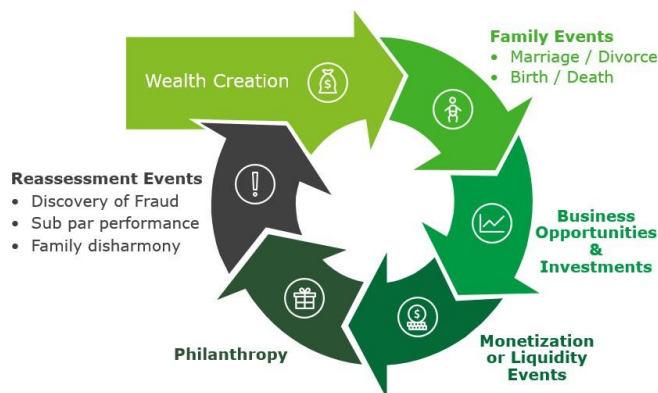
Family Life Events Lab

A process for reaching consensus on key decisions across the cycle of family wealth

Across the lifecycle of wealth, high net worth families face many important decisions involving strategic, financial, and operational considerations. Careful analysis, planning, and communication are important to facilitate strong alignment, both among family members and between the family, the family office that oversees the family's financial affairs, and key stakeholders, such as trustees and legal and investment advisers.

Deloitte's Family Life Events Lab is a vital resource to accelerate the decision-making process. These sessions are designed to help families make meaningful headway on tough issues and address specific challenges associated with family offices.

Key events across the cycle of family wealth



Clarity through analysis and insight

Deloitte's Family Life Events Labs are driven by major events in a high, net worth family's life. Each lab is specially designed to help the family and family office navigate issues associated with the family's complex financial and personal challenges and opportunities.

Live Events Labs can also help address specific issues surrounding the family office itself, whether it's the design and implementation of a new family office or the review of any area of an existing family office's operations or performance, including:

- Governance
- Family-client relationship management
- Tax efficiencies
- Regulatory compliance
- Accounting and recordkeeping
- Internal controls
- Treasury and cash management
- Human resources
- Succession

A Place Built to Facilitate Your Success



Research-based content

Frameworks built on empirical data, research, focused expertise, and cumulative learnings from more than 8,000 sessions



Immersive methods and exercises

Exercises based on behavioral research and team dynamics, and on conversations with your people



Relevant subject matter specialists

Diverse perspectives from specialists selected because they know your challenge, industry or business



Highly trained Deloitte facilitators

Business practitioners specializing in intervention, disruption, alignment, and consensus building



Custom-Designed Environment

Movable panels, flexible furniture, and an intimate space built to spark conversation

Through immersive one or two-day interactive sessions, Deloitte facilitators use tested methodologies, such as design thinking, innovation theory, group dynamics, and behavioral science, to help family members, family office executives, and other key stakeholders outline a vision for process improvement. The resulting insights can help participants align on important perspectives and expectations, assess the effectiveness of family office critical processes, and then prioritize opportunities for transformative change.

The outcome of the Family Life Events Lab is an action plan that identifies key milestones, deliverables, and owners to move the opportunities forward.

Want to deliver new value to your organization?

Let's start planning your lab experience

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