

## Family Office Formation Lab

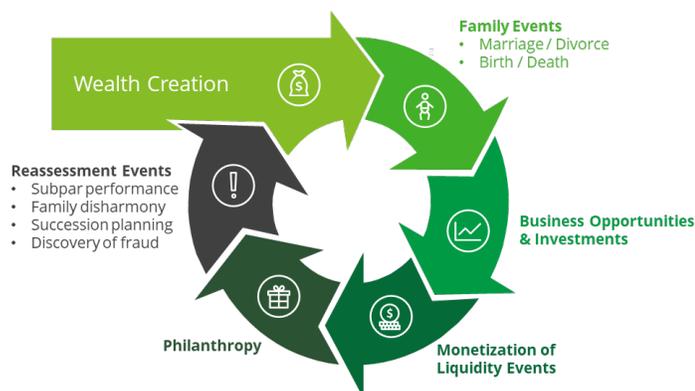
Creating a strong foundation

With the creation of significant wealth, exciting opportunities, as well as new challenges, can arise as the family acclimates to the increased complexities of wealth. One important decision may be establishing a family office to oversee the financial and personal affairs of the family.

Forming a family office is a big step – one that involves many financial, logistical, operational, and emotional considerations, and can require input and coordination from many stakeholders.

Deloitte's Family Office Formation Lab is specially designed to help a family and their trusted advisers identify and address these considerations and to provide a means to build consensus and make thoughtful decisions in an accelerated timeframe.

### Key events across the cycle of family wealth



### Clarity through analysis and insight

Deloitte's Family Office Formation Lab can be tailored to explore any of the following topics:

- Family values and family office mission statement
- Family office ownership
- Identification of family office clients and relationship management
- Scope of services, including in-house versus out-source decisions
- Talent models for the family office
- Revenue models for the family office
- Cost structure of the family office
- Risk management and controls
- Tax efficiencies
- Family and family office leadership succession planning

## 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 Office Formation 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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