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.

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

Key events across the cycle of family wealth

- Wealth Creation
- Family Events
  - Marriage / Divorce
  - Birth / Death
- Reassessment Events
  - Subpar performance
  - Family disharmony
  - Succession planning
  - Discovery of fraud
- Business Opportunities & Investments
- Philanthropy
- Monetization of Liquidity Events
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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