



Deloitte Family Office Lab Experiences

Transforming your family office

Family office executives find themselves in a new reality today. Faced with growing regulatory and business complexity, significant compression in the compliance timeline, increased demands for timely performance reporting, and evolving technology, family office leaders and family members are asking for more strategic insights from the family office. To deliver this next-level value, family office leaders may need to change the way they lead and how their teams operate. A family office that will thrive in the future will pair people with technology to amplify their collective impact. But these wholesale changes are hard to implement. How do you get started?

Experiences tailored for you

Deloitte's Family Office Lab Experiences are customizable one- or two-day live interactive sessions that enable family office leaders and their teams to step outside business as usual to address complex challenges.

During a lab experience, we can help you identify and gain alignment for your organizational goals and develop an actionable road map for making the operational, technology, and talent changes you need to realize those goals them.

Customize your lab experience

Deloitte Family Office professionals will work with you to design an experience that addresses your challenges around data, process, technology, and talent, considering an overall transformation to meet the future family office needs. If any of the following questions resonate, a Deloitte Family Office Lab Experience may be right for you.

Transformation

You know you need to do something different, but you want to explore the options before moving forward.

- Are you challenged by ever-increasing demands from stakeholders for more timely and actionable data?
- Are increasingly complex tax and regulatory reporting requirements being addressed by current resources?
- Are you being challenged to do more with less?
- Does the family office have the structure to meet the evolving demands of the family?

Process and Technology

You want to learn more about process improvements and technologies and how they can help you operate with more impact and greater efficiency.

- Are there processes that have existed for years, and you wonder if there's a better solution available?
- How can your family office professionals integrate automation to achieve favorable outcomes?

- Do you face difficulties with data collection? Are there opportunities to streamline collection and data aggregation to drive greater insights and identify planning considerations?
- Do you need to gain a better understanding of technologies available and how they can help you amplify the value the family office can deliver?

Talent

You recognize that the skills needed from your team are changing quickly, and you want to make sure you're planning for tomorrow.

- What skills are required to bring the family office into the future?
- Do you need to reconsider how you develop these future capabilities?
- Do you wonder if there's a better way for the professionals to digest current technical information and quickly analyze the impact to the family?
- Do you need to break down silos within the family office to gain alignment around a common vision for improving communication and collaboration?

A course of action you can count on

Deloitte Family Office Lab Experiences provide you with a blueprint for success, a blueprint that you can begin implementing the next day. We do this with:



Specialized tax experience helping family office leaders realize a moment that matters—whether it's transition, transformation, or exploring the art of the possible



Research-based content built on empirical data and cumulative learnings from more than 8,000 sessions consciously designed to help shift perspectives and enhance exploration



Immersive methods and exercises based on behavioral research and team dynamics



Relevant subject matter specialists that know your challenge, industry, or business



Highly trained Deloitte facilitators who specialize in intervention, disruption, alignment, and consensus-building

Want to deliver new value to your organization?

Let's start planning your lab experience.

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The CTO Program

Take it from our clients . . .

"It was great to leave the meeting with a clear direction and action steps to take in addressing our top priorities."

"The opportunity for our leadership team to spend a full day away from the day-to-day to focus on the department direction was really good."

"The process forced us to put our thoughts and ideas out there and subject them to group critique and discussion."



**MAKING AN
IMPACT THAT
MATTERS**

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