Family Offices and AI

Preparing your Family Office for an AI-Enabled Future

Family offices have leveraged technology to enhance operations, promote transparency, and support decision-making – but GenAI marks a new inflection point. Leading family offices are rethinking their data strategies, using AI to accelerate transformation across their complex estate structures and investment portfolios. Spanning the front, middle, and back office, these capabilities enhance visibility and the ability to act quickly with precision. In this evolving landscape, a clear long-term strategy is essential for continued success.

Family Offices need to solve three primary challenges when adopting AI:

- **Set a strategic AI agenda**
- **Prepare for the future of work**
- **Balance innovation with responsible AI**

Our three-stage framework guides clients through:

Definition of value-driven AI strategy

Identify how AI can strengthen strategic advantage across the family office-whether through smarter investment decisions, enhanced operational efficiency, or personalised services-while aligning with long-term family values and legacy goals.

Capability & technology foundation assessment

Determine the digital, organisational, and infrastructure capabilities required to adopt and scale AI across the family office-evaluating governance, data readiness, ecosystem, and workforce skills to enable a secure, effective, and future-ready implementation.

Adoption of Responsible AI practices

Apply responsible AI practices across office activities by embedding transparency and accountability into governance and decision-making-in order to align AI use aligns with your values, manages risk, and builds long-term trust.

Family enterprise and AI qualifications

170 +
years serving families

3,100 +
families in the US

2,300 +
dedicated professionals serving families in the US

13,000 +
family clients globally

WealthTechAmericas AWARDS 2025
brought to you by WealthBriefing
WINNER
Outsourcing and Business Process Management
PwC

300 +
Digital transformations across industries

28,000 +
Global cloud, data, and AI FTEs

8,200 +
AI professionals

40 +
academic, NGO, industry body, and govt. collaborations

PwC ranked **Leader for AI Consulting**
FORRESTER®

Our Approach: Guiding your AI journey from strategy to execution

Foundational Phase

AI Training and Awareness Building

We provide hands-on training to build foundational AI knowledge, align team understanding, and prepare your organisation for responsible AI adoption.

Strategy Alignment & Use Case Discovery

We facilitate strategic workshops to define AI objectives, uncover high-value use cases, and establish a framework for evaluating opportunities.

Laying the Ground-work for Execution

We help assess readiness, define governance, and create a prioritised AI roadmap to guide practical implementation.

Foundational Phase

Bringing your AI Strategy to Life

We activate your AI strategy by implementing prioritised use cases, integrating solutions, and scaling with governance and user feedback to drive sustainable impact.

Key Outcomes and Deliverables

AI Training and Awareness Building

- Training Materials
- Facilitated Training Session

Strategy Alignment & Use Case Discovery

- Collaborative Agenda
- Interactive workshop
- Documented strategy

Laying the Ground-work for Execution

- Workshop summary including action items and next steps
- High level use case inventory and timing

Bringing your AI Strategy to Life

- To be determined based on recommendations and requirements identified during the foundational phase

Key themes identified across family office use cases

Enhanced data synthesis

aggregating and normalising siloed and fragmented data, can surface customised analytics aligned with a family's unique values into a single source of truth.

Expedited research and analysis

augmenting, automating and broadening access to analytics, accelerating processes across research (e.g. investment research) to portfolio mgmt. (e.g. portfolio monitoring) for effective decision-making.

Smarter processes for a more scalable office

automating business critical processes, particularly where documentation and text plays a key role, for example preparing IC memos, etc.

Bringing together a team with a broad range of expertise to support your AI journey across your enterprise.

- **Family Office**
- **Asset & Wealth Management**
- **Philanthropy**
- **Data Management**
- **Process**
- **Advanced Analytics**

Let’s talk

Please get in touch if you would like to discuss any of the above matters. We look forward to hearing from you!

Lisa Cornwell
Partner, Leader Private Clients and Family Offices, PwC Switzerland
+41 58 792 25 93
lisa.cornwell.webb@pwc.ch

Jacqueline Landmann
Director, Tax (Private Clients and Family Business), PwC Switzerland
+41 58 792 53 96
jacqueline.landmann@pwc.ch

Anna Stepuk
Senior Manager, Private Clients and Family Offices – Emerging markets, PwC Switzerland
+41 58 792 48 60
anna.stepuk@pwc.ch

Adelya Nabiullina
Senior Associate, Private Clients & Family Offices, PwC Switzerland
+41 58 792 44 00
adelya.nabiullina@pwc.ch