Family Office Diagnostic

An analytical framework designed to illuminate processes, uncover risks, and identify opportunities across your family office operations.

Rethinking the family office for a changing world.

Today, we're seeing significant changes for family offices across a number of dimensions. More than ever, families are forced to rethink their future, assessing their risks, needs and priorities, and the role of the family office has therefore become critical.

Globalisation

As families become more global and diversified in their holdings, the complexity of managing the portfolio increases.

Transparency

Increased scrutiny and legislative pressures demand greater transparency of wealth structures.

Institutionalisation

Wealthy families are finding benefit in organising and formalising activities.

Technology

There are many great solutions on the market - knowing how, what and when to deploy technology requires regular review to keep up with fast pace of change.

Cyber and privacy

There are ever-increasing concerns around data integrity, cyber security and disaster recovery.

Professionalisation

Recognising the need for specialist know-how, family offices increasingly hire external experts in specific disciplines.

Generational shift

Families will face an inevitable shift in the mindset and attitudes of succeeding generations.

Impact and sustainable investments

Family offices become more engaged in discussions about sustainable and impact investing as well as philanthropic activities.

Introducing the Family Office Diagnostic

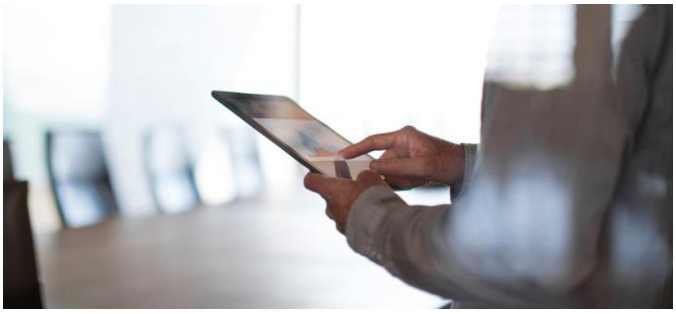
The Family Office Diagnostic measures the health and degree of sophistication of your family office, giving you clarity and confidence by highlighting where your office excels and where there is potential to do even better. It provides a clear outcome that helps identify specific needs, potential risk areas, and opportunities, allowing you to pull together a concrete plan of action.

Our global diagnostic service provides a comprehensive evaluation across compliance, legacy, enterprise, operations, investments, succession, and technology. The result gives you the clarity to create a focused roadmap and actionable recommendations to enhance efficiencies across your family office.

Stay ahead of regulatory demands with confidence and clarity.

Safeguard what matters most and build a clear path for the next generation to lead with confidence.

Align your family enterprise structure with your long-term vision and values.



Streamline processes and unlock hidden efficiencies.

Ensure robust oversight and alignment with your family's goals.

Harness the power of technology and AI to future-proof your family office.

Our diagnostic approach

Our diagnostic approach begins with a workshop designed to understand your goals and how your family office compares to your peers. Our framework scores across seven categories and over 150 characteristics, depending on your chosen focus areas, delivering a detailed picture of where you stand today and where you can go next.

Category	Description	Sub-categories
Legacy	Family vision, governance, communication, education and strategic planning.	Communication, Education, Governance, Strategy
Enterprise	Overseeing family businesses, running the family office and supporting family charitable entities. Includes physical security and disaster recovery.	Business, Family office, Disaster, Philanthropy
Operations	Accounting, recordkeeping, bill payment and other transaction processing.	Control, Recordkeeping, Procedures
Investments	Investment governance and operations, including oversight committees, policy statements and reporting.	Governance, Process, Investment policy statements
Succession	Planning for family, family office, and business leadership, as well as estate planning, and trustee and beneficiary roles.	Planning, Ownership, Leadership
Technology	Various systems and technology, including AI readiness, technical support, and cyber security for the family and family office.	Cyber, Systems, Support
Compliance	Tax planning and compliance, including proactive management of exposure both locally and internationally.	Regulatory, Tax, Insurance

Your diagnostic results

Following completion of the diagnostic questions, we deliver a detailed report, accompanied by a personalised presentation and direct feedback from our team, that gives you a clear, prioritised roadmap to take immediate action and drive meaningful change across your family office.

Get in touch with our team to explore how the Family Office Diagnostic can help strengthen and future-proof your family office.

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