



# Global family office services

Helping you to seize opportunities,  
manage risks, make a positive impact  
and protect your family legacy.



# Contents

	<b>Slide</b>
Introduction	3
The four cornerstones of your future-ready family office	4-8
Our holistic offering: future-proof your family office	9
Build your family office future-ready	10-11
Make your family office future-ready	12
Family office services	13-14
PwC digital family office	15
What sets us apart	16
Contact us	17

## Introduction

As a family office, you are a unique organisation – one with many inherent advantages when responding to challenges of an increasingly complex global environment. However, if you expect to grow and preserve your family legacy over the long term, you should consider adopting a new mindset and changing the way you operate. We have identified the key areas you will need to consider when building or re-imagining your family office. We call these the four cornerstones of your future-ready family office.

## Your future-ready family office

The four cornerstones provide the insight to develop innovative tools and services to ensure two key results. First, your family office is “built around you”. Second, your family office is future-ready and resilient to shock – enabling you to seize opportunities, manage risks, create meaningful impact and protect your family legacy – now and into the future. Let’s reimagine your family office.



# Four cornerstones of your future-ready family office



## Cornerstone one: From values to impact

Renew your licence to operate while building your legacy

### The challenge

Your family office can generate better returns, manage risks successfully, build trust and become truly shock-resilient by adopting an active approach that turns your family values into its most valuable assets, focused on achieving total impact. What's more, past approaches that target the management of family dynamics and growing wealth can become dated. To stay relevant, family offices need to redefine their role and renew their licence to exist and operate as your purpose and embedded values become a business imperative for true impact.

Codifying your family's values and purpose will ensure they are properly understood and embraced by all, communicated openly and fully embedded in your strategy – with progress towards them systematically reported. To be successful in this effort, your values and purpose should inform every decision and aspect of your family office. Not only will it guide your investment strategy for better returns, it will have a positive effect on the beneficiaries as well as wider society and environment.



### Our response

PwC's multi-disciplinary family office teams have extensive experience in helping family offices and wealth holders bring their values to life. Our support ranges from codifying family values and embedding them in every decision, to advising on sustainable investments, impact investing, impact measurement, philanthropy and much more. All of this ultimately helps family offices to renew their licence to operate and to deliver on their purpose.

## Cornerstone two: Agility

Seize opportunities and manage complexity as well as the unexpected

### The challenge

In today's rapidly changing environment, your family office is under increasing pressure to make decisions in a fast and agile way. This is vital if you're to manage increasing complexity and responses to unexpected events while having the ability to seize opportunities.

Having the right governance and management structures enables nimble decision-making. For your decisions to be effective you need access to relevant, reliable and timely data – as well as having the processes and tools in place to analyse, present and use the data in value-creating ways. This means that managing the family portfolio becomes significantly more complex. Your strategies must include the right operating model, tools and mapping for the right route to digital transformation.



### Our response

The innovative and responsive solutions we have developed will help you structure your family office to be agile, transparent and effective – while also future-proofing it through digital transformation powered by specifically designed technology for family offices. We can help by identifying and designing technology solutions that provide easy and seamless access to data, while enabling you to store, organise and interpret your information around your wealth, communicate effectively and enjoy peace of mind with confidence that your data is safe and secure.

## Cornerstone three: Leading practice - fast forward

What does “great” look like tomorrow?

### The challenge

As leading practices continue to evolve, they can only be considered “best” for a finite period and what’s best in class keeps moving forward. Against this background, leading practices can be applied in a host of areas, including, but not limited to governance, location selection, investment strategies, business models as well as recruitment and retention. Family offices need to understand how to harness and capitalise on current leading practice in these areas and be able to access up-to-the-minute advice on what “good” looks like in all areas and functions to ensure maximum efficiency.



### Our response

We can show you how leading practices apply to you and how they can bring you the power of our global family office experiences. Equipped with this knowledge, our multi-disciplinary and multi-jurisdictional teams can support you in building your family office from the ground up or advise you on a specific area or need. We can show you what good looks like...today and tomorrow.

## Cornerstone four: Safety and privacy

Managing risks to protect your legacy

### The challenge

Society is now living and working in volatile, uncertain and fast-moving times. So, now more than ever, your family office needs to prioritise all aspects of safety and risk management, including the strategies to follow and the tools to use.

The risk universe is becoming ever more complex. Your approach to safety and risk management should be holistic in nature. The levels of risk that your family office is exposed to are rising every day. You'll need to be ready to navigate complex risk scenarios that go far beyond the traditional investment and operational issues. Disciplines include digital transformation, technology advancements, cyber security, reputation, climate change, privacy, transparency, personal safety, compliance and succession.



### Our response

Backed by the wide-ranging resources and experience of the global PwC network, our family office teams can bring you support from advisers and thought leaders on cybersecurity, data protection, privacy and transparency. We also give you access to our capabilities and intelligence to help keep your business safe and secure, ranging from regulatory compliance to ethical practices to risk management strategy and support across risk types.



# Future-proof your family office — our holistic offering

Building on the 4 cornerstones our holistic service offering is aimed at meeting the challenges set in the cornerstones in order to build, grow and protect your legacy.

## Build

your future-ready  
family office

## Make

your existing family  
office future-ready



## Build your future-ready family office

PwC's approach to setting up a future-ready family office: start with the vision.

Setting up your family office starts with defining the vision for your office and purpose for the family and its wealth. Once we understand the purpose and needs of the office, we help you build on this foundation to design each of the components to seamlessly support your family's legacy.

We conduct an extensive analysis through research and interviews to understand past, current and future vision. We can help you create an overall plan that encompasses key areas, including operations, technology, staffing needs, advisers and governance that is truly built around you. Regardless of the size, type or complexity of your organisation, we help you build the structure that best serves you to be future-proof and shock-resilient.

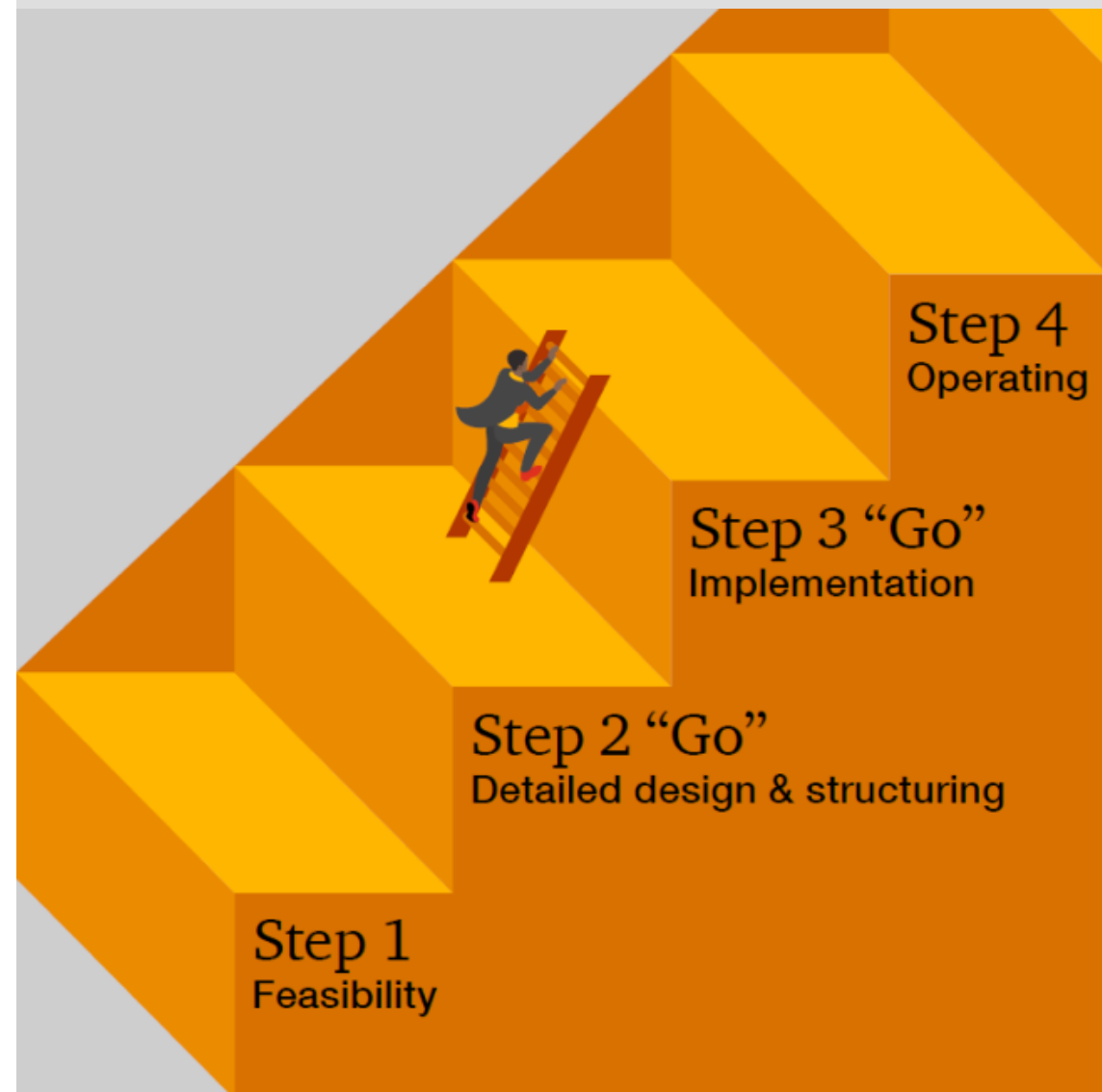


## Build your future-ready family office in four steps guide

The thought of setting up a family office could be a daunting one but doesn't need to be. Our four steps guide to build your family office will provide you with a thorough yet easy to navigate document that breaks down the process for easier understanding. It is aimed at building your confidence in undertaking the process and our global network of professionals are here to help.

Creating a successful family office requires strategic planning and design. With decades of experience, we can help to prepare you for each step of the way – from assessment and vision to work plans and implementation. Together, we can help you design a strategy to manage the complexity that comes with a family-owned business.

You can download our Build your family office guide [here](#).

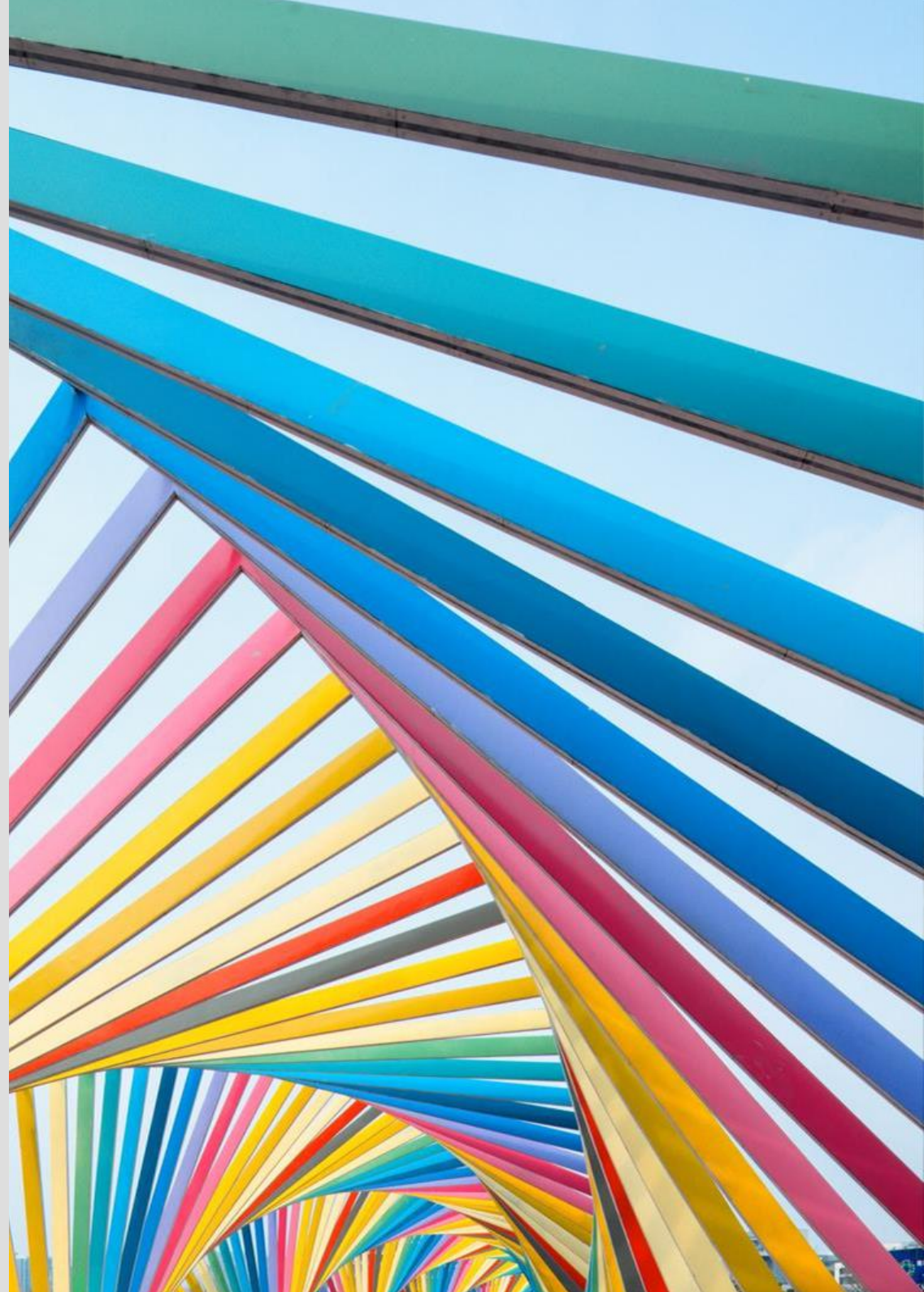


# Make your family office future-ready with PwC's Family Office Diagnostic

## Is your family office ready for tomorrow?

For those with an established family office we employ the PwC Family Office Diagnostic Tool, a proprietary web-based framework that provides an intuitive analysis of the services, processes, and risks contained within a family office.

Our benchmarking tool is built around the eight core frameworks identified in PwC's family office services and comprises over 200 questions based on best practices for successful family offices. The framework provides a clear outcome for our multi-disciplinary and international teams to design the services you need.



# PwC's Family Office Diagnostic: 8 core frameworks



## PwC's family office services

Our Family Office Service offering is built around you and structured into 8 core frameworks reflecting the core functions and services family offices are usually structured to provide. This is to ensure that our offering supports your needs in the most tailored and effective way.

Our multi-disciplinary and international teams can provide holistic and independent services and advice around each area of concern. The goal is to bring the whole of PwC to you in the most effective and tailored way so you can achieve your goals and ultimately to protect your legacy.



## PwC digital family office

Our drive is to support your family office to be future-ready and to meet the digital challenges is outlined in our four cornerstones. PwC has partnered up with leading technology developers to provide integrated solutions for high net worth families to fully support all your family's data, reporting and analysis needs.

PwC's digital family office offering, Wealth Compass, is a family wealth portal designed for high and ultra-high net worth families, single-family offices, multi-family offices, trust companies and wealth managers. Our advisers will work with you and your family office to implement Wealth Compass. Wealth Compass is an innovative managed service that provides better visibility into your portfolio, performance and potential risk exposures as well as an automated and efficient back office, so you can focus on strategic decision-making, instead of transaction processing and data management.



## What sets us apart

### PwC global family office network

We are one of the world's most extensive networks of multi-disciplinary teams for family offices.

With more than 160 years of experience and 5,000 people dedicated to serving family offices and wealth holders across all our lines of service and geographies, we can help you set up your family office or help you strengthen its foundations with our four cornerstones approach, family office diagnostic and holistic service offering. Please contact our global team (see details on the next page) to be connected to your local adviser.

### Thought leadership

Our Future Ready Family Office guides and Family Office Trends Barometer newsletter are aimed at providing you practical advice and showcase our point of view on some of the key issues affecting you as a family office today as well as bringing you the latest trends and thought leadership from around the world. Visit our PwC's Global Family Office site at [www.pwc.com/familyoffice](http://www.pwc.com/familyoffice) to explore our content and new reports and thought leadership.





## Global Family Office Contacts



**Peter Englisch**

Global Family Business and EMEA  
Entrepreneurial and Private Business Leader,  
PwC Germany

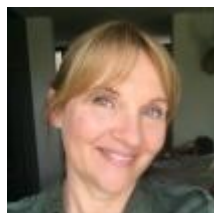
[peter.englich@pwc.com](mailto:peter.englich@pwc.com)



**Brittney Saks**

Global Leader, UHNWI Private Wealth,  
PwC United States

[brittney.b.saks@pwc.com](mailto:brittney.b.saks@pwc.com)



**Aleksandra Jovanovich**

Global Program Leader and Chief of Staff,  
Private Wealth, PwC Switzerland

[aleksandra.jovanovich@pwc.com](mailto:aleksandra.jovanovich@pwc.com)

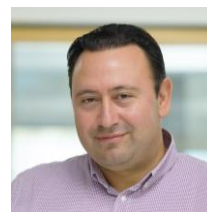


**Francesca Ambrosini**

Family Business Client Programs Lead,  
PwC United Kingdom

[francesca.ambrosini@pwc.com](mailto:francesca.ambrosini@pwc.com)

## Cyprus Family Office Contacts



**Tony Hadjiloucas**

Partner  
In charge of Private Wealth Services  
PwC Cyprus

[tony.hadjiloucas@pwc.com](mailto:tony.hadjiloucas@pwc.com)



**Phryni Yiakoumetti Mina**

Director  
Private Wealth Services,  
PwC Cyprus

[phryni.yiakoumetti@pwc.com](mailto:phryni.yiakoumetti@pwc.com)



**Natalie Vassiliou Moustaka**

Senior Manager  
Legal Advisory Services  
PwC Cyprus

[natalie.v.moustaka@pwc.com](mailto:natalie.v.moustaka@pwc.com)

[pwc.com/familyoffice](https://pwc.com/familyoffice)