



**Build a future
that will last
for generations
with EY Family
Office Advisory
Services**

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The better the question.
The better the answer.
The better the world works.



EY

**Shape the future
with confidence**

It's a journey ... where are you?

Family offices face challenges that distinguish them from other entities – challenges that, if not addressed, can reduce wealth, jeopardize family unity or derail the family's legacy. Here are a few of the common challenges:

- Increased financial complexity and pressure for transparency, raising significant concern about tax and regulatory issues
- Urgency around digital transformation and preparing for potential cybersecurity breaches that can create financial losses or jeopardize secrecy and privacy
- Lack of a robust risk management framework and process for identifying and mitigating risks, including IT security, legal, audit, tax and competitive risks, as well as threats from creditors and regulators
- Mounting pressure to focus on nonfinancial performance and long-term value prompting consideration of outsourcing some activities
- Growing concerns about wealth preservation and succession planning within family businesses and difficulty aligning interests between the business, advisors and family when multiple advisors work with multiple family members, threatening sustainability and continuity

Whether you are creating a new family office, separating the family office from the family business or shepherding an existing office, it is important to ask how you are helping your family secure its financial future and legacy for the next and future generations.

Consider the evolution of family offices

A family office can take many forms. As family wealth increases and business needs get more complex, the family office may evolve from a simple founder's office into a complex, full-service company. And the office could revert over time.

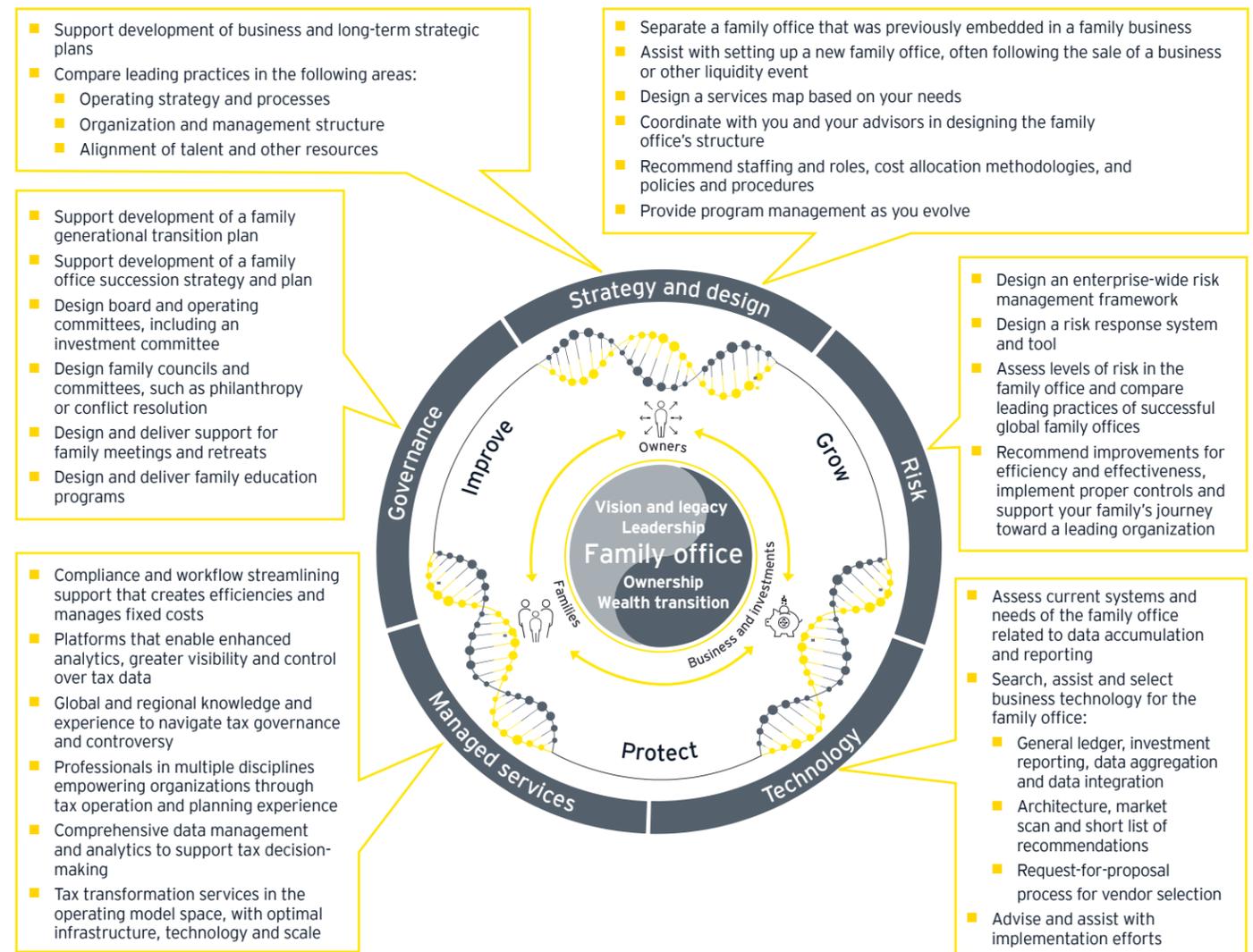


* Private trust companies help a family govern, manage and administer the trusts of the family.

Our approach

Each family office is positioned at the center of the owners, families, and the businesses and investments they own. Family office leaders support the family's vision and legacy, leadership, ownership, and wealth transition decisions with a focus on protection, improvement and growth. Our job is to support the legacy of your family office through our customized approach to the DNA of a family office, including strategy, design, governance, risk, technology and managed services. What does legacy look like to you?

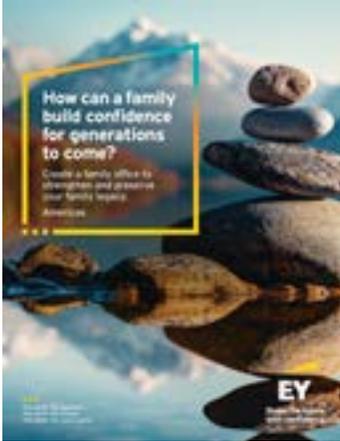
Our team can support your team in the following areas:



Some or all the services mentioned herein may not be available for audit- or independence-restricted clients and their affiliates. Please contact your local EY professional to confirm availability.

EY Americas Family Office guide

Download our [detailed playbook](#) for those planning to set up a family office and also for those looking to set benchmarks of leading practices within their existing family office.



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About EY Family Enterprise

We offer dedicated services for [family offices](#), [family businesses](#) and [wealth transition](#) to ambitious business-owning families. These practices share a deep commitment to the entire [family enterprise](#).

EY | Building a better working world

EY is building a better working world by creating new value for clients, people, society and the planet, while building trust in capital markets.

Enabled by data, AI and advanced technology, EY teams help clients shape the future with confidence and develop answers for the most pressing issues of today and tomorrow.

EY teams work across a full spectrum of services in assurance, consulting, tax, strategy and transactions. Fueled by sector insights, a globally connected, multidisciplinary network and diverse ecosystem partners, EY teams can provide services in more than 150 countries and territories.

All in to shape the future with confidence.

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