

An aerial photograph of a Swiss city, likely Zurich, featuring a river in the foreground, a prominent church tower with a clock face, and a dense urban landscape with red-tiled roofs. The image is overlaid with a purple gradient on the right side and yellow autumn leaves in the top left corner.

FBN
Switzerland

The logo for FBN Family Office, consisting of three interlocking white circles on the left and the text 'FBN' in a large, bold, white sans-serif font, with 'FAMILY OFFICE' in a smaller, white sans-serif font below it.

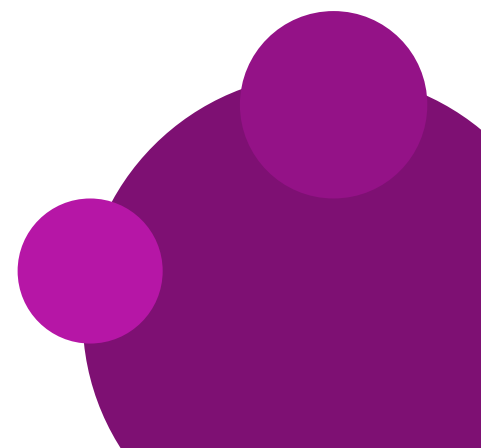
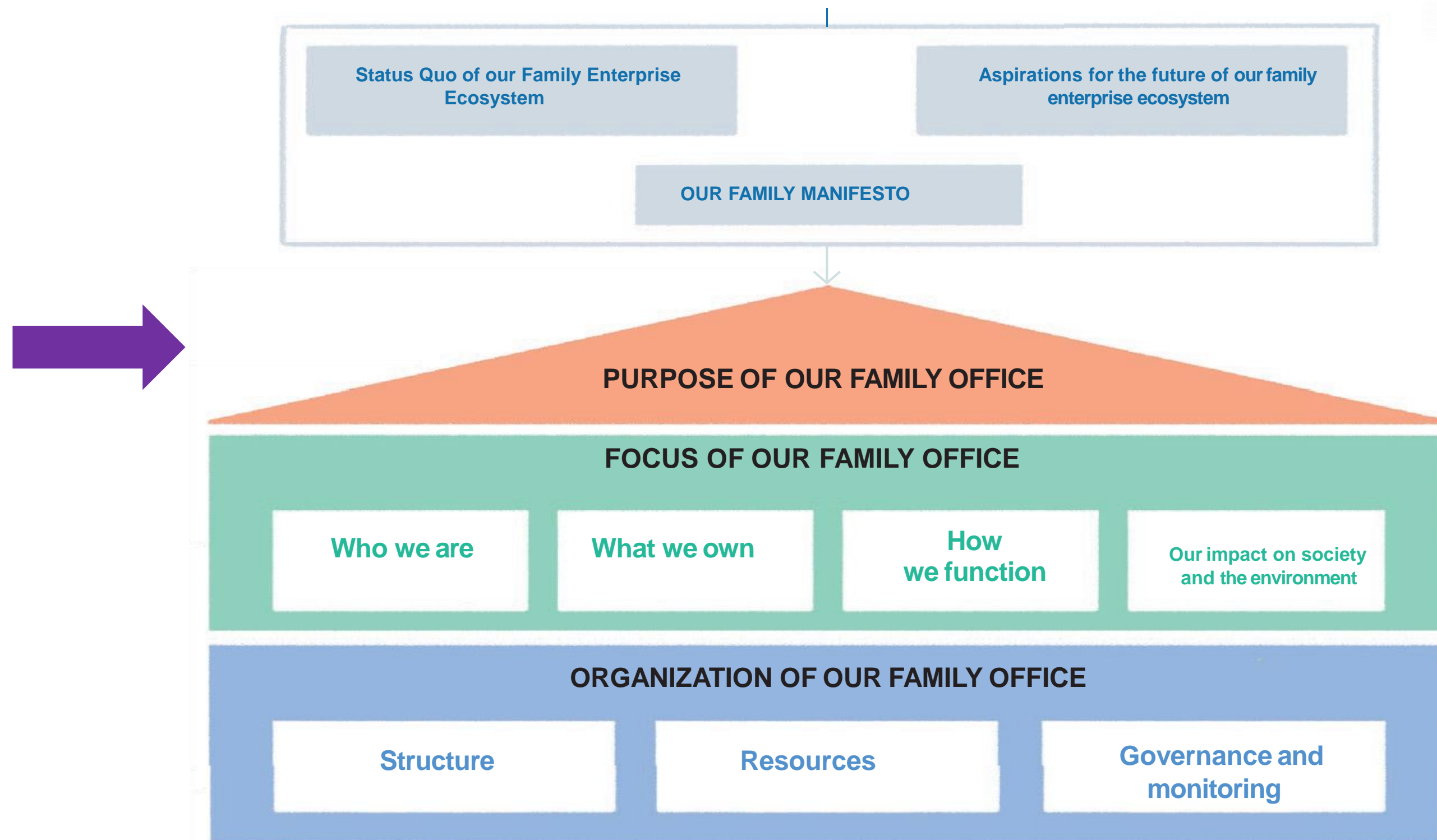
FBN
FAMILY OFFICE

Work session Aspiring to set up a Family Office

The implication of the Family Office purpose on strategy

Group Work – Aspiring to set up a Family Office

The Family Office Strategy House

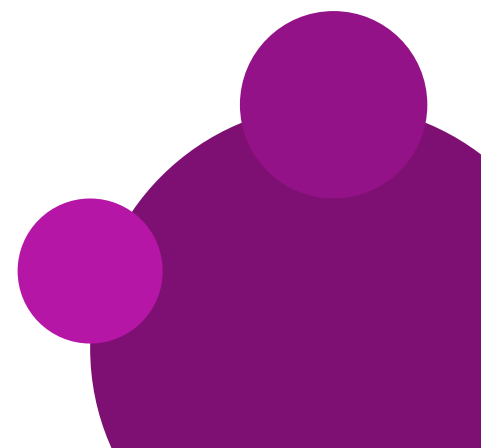


Group Work – Aspiring to set up a Family Office

The Family Office purpose



- ***A purpose is a fundamental ingredient for your family office and family:***
 - ***It states its fundamental meaning, its ultimate objective, its North Star, its direction***
 - ***It provides clarity on why the family office exists, what it is meant to achieve and what it does***
 - ***It serves as an important anchor and reference for family members and family office employees***
 - ***It creates cohesion and alignment between family members with respect to what they want from their family office***
 - ***It helps establish trust between different stakeholder groups***
 - ***It provides guidance to family office executives on what the family office should achieve***

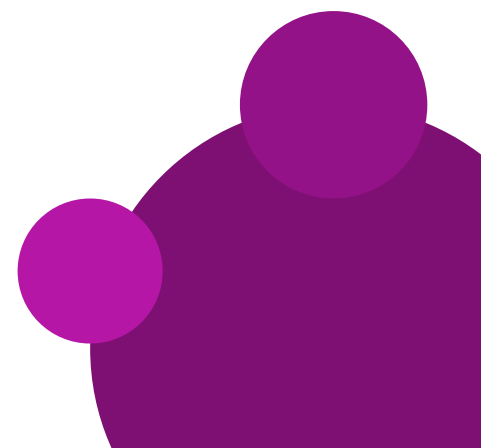


Group Work – Aspiring to set up a Family Office

Family Office purpose statement - Examples



- Driven by the desire to **create a healthy, fair, and equitable world** for the future, we **invest in the future of food and water.**
- Our mission is to **steward our legacy, cultivating growth** through strategic investments while **upholding our commitment to societal betterment and sustainable practices.**
- Building on our **entrepreneurial spirit**, we pursue investments that drive **innovation**, foster **business growth**, and generate **long-term value**. Our family's commitment to a **sustainable future** guides our investments, emphasizing both **financial return** and **positive environmental impact.**



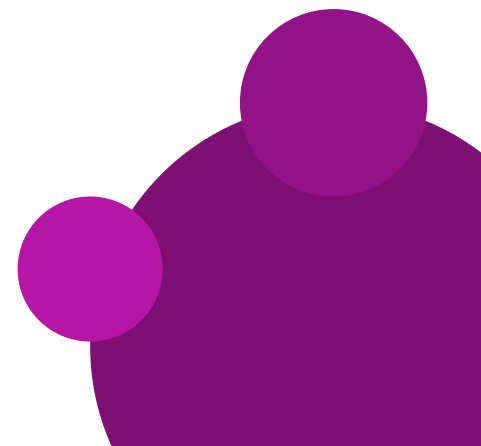
Group Work – Aspiring to set up a Family Office

The implication of the Family Office purpose on strategy



We have identified five strategic choices that we believe are critical for you and your family to review and discuss as you embark on defining the purpose of your (future) family office:

1. Do we want our Family Office to meet **immediate or long-term needs** ?
2. Do we want our Family Office **to preserve legacy** (values, business activities and assets) or **driving renewal** (changing direction, starting a new journey through new investment activities) ?
3. Do we want our family office to primarily **manage financial, human or social capital** ?
4. Who do we want our family office **to serve** (me, my branch, wider family, other close families, other families) ?
5. Do I or do we need a **dedicated family office**, or could our needs be served by an **existing multi-family office** or by creating a **hybrid family office structure**?



Aspiring to set up a Family Office

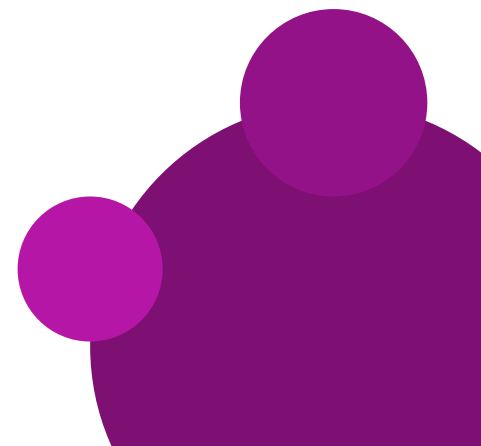
Group work – Family Office purpose



Methodology:

Please choose a moderator, presenter and a timekeeper

- 1. Reflect individually on your potential family office purpose by answering the 5 strategic questions (10mn)**
- 2. Exchange with your table (20mn):**
 - Which strategic choices are more relevant or important for you than others?**
 - Which challenges are you expecting to face when it comes to practically setting up your Family Office, where do you need most help?**



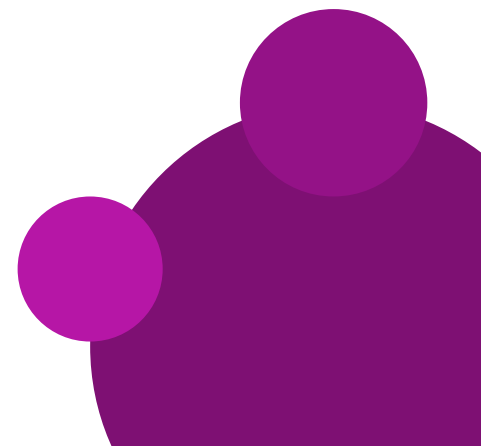
Aspiring to set up a Family Office

Group work – Family Office purpose



Feedback in the plenary (10-15mn)

Each table: What are your key take aways ?



Aspiring to set up a Family Office

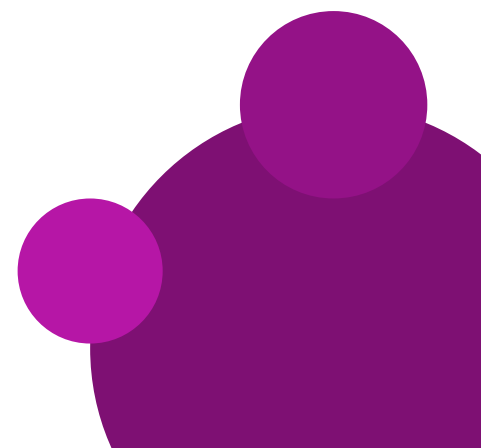
Conclusion and next steps



Let's get started through an inclusive transparent process by walking through the Family Office Strategy House

1. Use **with your family** the Family Office Navigator to **analyse the status quo** and the **aspirations** of your family enterprise **ecosystem** to write your **family manifesto**
2. Define your **family office purpose statement**
3. Define the **core activities and services** of your family office to help you manage your total family wealth and your family enterprise ecosystem
4. **Organize** your family office

with the help of the Family Office Navigator!





THANK YOU!

Title



Ownership matters

- text

