

Essential Reads *on* Family Offices

Contents

Foreword _____	3	Governance _____	41
Family office profiles _____	5	Case study – design and set up _____	42
Family office profile: Rodolfo Paiz, _____	7	of a family investment office	
CEO of the PT Family Office (Miami and Guatemala)		<i>Guillermo Barandalla</i>	
<i>Interview by Suzy Peterfriend</i>		Family mission vision and values _____	45
Family office profile: Northwood _____	10	statements: the essential foundation	
Family Office		of an effective family governance system	
<i>Interview with Tom McCullough by Barbara R Hauser</i>		or just another form that cannot function?	
An interview with Sue Nickason of _____	15	<i>Christian Stewart</i>	
Dart Family Office		The three family constitution _____	53
Governance, entrepreneurship, resilience ____	17	archetypes and a wise alternative	
and reinvention on the five-generation		<i>Christian Stewart</i>	
journey of a family enterprise		Family constitutions, the rule _____	60
<i>Dennis T Jaffe, Maya Prabhu and Carolina Cintra</i>		of law and happiness	
Family office profile: VALUEworks AG, ____	26	<i>Barbara R Hauser</i>	
Zurich/Switzerland		Stress tests – building resilience _____	68
<i>Interview with Kecia Barkawi, CEO and founder</i>		in the face of a crisis	
<i>of VALUEworks AG by Barbara R Hauser</i>		<i>David Werdiger</i>	
Family business, family office and _____	30	The benefits of applying the rule _____	74
next gen		of law in family governance	
<i>Fabrizio Arengi Bentivoglio</i>		<i>Barbara R Hauser</i>	
Single-family offices in the 21st century ____	33	The great man fallacy and family _____	79
– remaining fit for purpose		governance	
<i>Iraj Ispahani and Carl Sjöström</i>		<i>Franklin J Parker</i>	

NextGen _____	85	Reframing succession in a disruptive era – a business family perspective _____	142
<i>Susan R Schoenfeld</i>		<i>Roger King and Jeremy Cheng</i>	
Family office succession planning _____	86	Five things wealthy families can learn from Lee Man Tat _____	148
<i>Antoaneta Proctor</i>		<i>Russell Cohen</i>	
The right time to involve the next generation _____	94	The next generation of strategic cultural philanthropy – impact, social justice and the opportunities for nextgen donors in the arts _____	150
<i>Raimund Kamp</i>		<i>Melissa Cowley Wolf</i>	
Parental expectations: effective guidelines or messy messages? _____	99	Effective mentoring for the next generation _____	159
<i>Amelia Renkert-Thomas</i>		<i>Jessica McGawley</i>	
Not the founder's family office: evolving to meet the needs of rising generations _____	106	Women: wealth and self-reliance _____	179
<i>Philippe J Weil</i>		<i>Philip Marcovici and Caroline Underwood</i>	
Let's do it the SMART way: a practical guide for the raising of affluent children _____	115	Safeguarding the family's digital narrative: how to navigate the challenges of the social media revolution _____	203
<i>Maya Prabhu</i>		<i>Charlie Bain</i>	
I'm successful, but can't talk to my children about money! Help! _____	122	About Globe Law and Business _____	219
<i>Asher Noor</i>			
The hows and whys of enterprising families reinterpreting timeless tales for their NextGen _____	127		
<i>Carly E Doshi, William J Kambas and Michael S Schwartz</i>			
Generational resilience through the integration of governance into structure _____	134		