

Family Offices: Structure, governance, and staffing

Training program SAM

Title / Topic	Family Offices in Wealth Planning: Structure, governance, and staffing
Target audience	Asset managers
Learning content	In the module «Family Offices: Structure, governance, and staffing» we focus on the structures that are chosen by Families to run the Family Office. We analyse similarities and differences between Single and Multi Family Offices. Also, we have a look at various governance mechanism that might be chosen by the family to effectively lead the office.
Learning location / Testing location	Fintelligence Online Lernplattform: https://vpbank-eam.fintelligence-net.com/
Learning time	<ol style="list-style-type: none">1. Family Offices: Structure, governance, and staffing (60 min)2. Learning control (60 min)
Learning goals	After studying this module <ul style="list-style-type: none">• you will understand the set of structures families can select from in order to manage and safeguard their assets;• you learn and understand difference between Single and Multi Family Offices;• you will get insights into how Family Offices are governed;• you will understand instruments such as family constitution, family charter, advisory council, family agreements, and continuous education measures that are relevant to governance and development of Family Offices;• you will get to know some important aspects about staffing of Family Offices.
Method	Self-study via interactive e-learning module with discoverable content and videos plus final learning control via online test.
Learning control	Your online self-control test consists of 10 to 15 multiple choice questions. You will pass the test if you reach at least 70% of the maximum score.