Private Wealth
& Family Office
Association

DEVELOPING A SUCCESSFUL PRIVATE WEALTH AND FAMILY OFFICE PRACTIVE

INTRODUCTION

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PROGRAM INTRODUCTION

Welcome to “Developing a Successful Private Wealth and Family Office Practice”. This program has been developed from the home of Private Banking & Family Office Service – Switzerland.

It is an extensive programme that explores the seven core process cycle required to successfully run a wealth services and/or family office practice. The programme also provides you with some relevant tools that could make the running of your practice easier.

We have cut through the noise and created a down to earth, value packed, practical and easy to understand program that will assist you to offer wealth services and run a family office practice.

While this program is **self-contained**, it is also **part of a wider series of programs** that work together to assist individuals to understand the realities of the wealth services world and to navigate through it successfully.

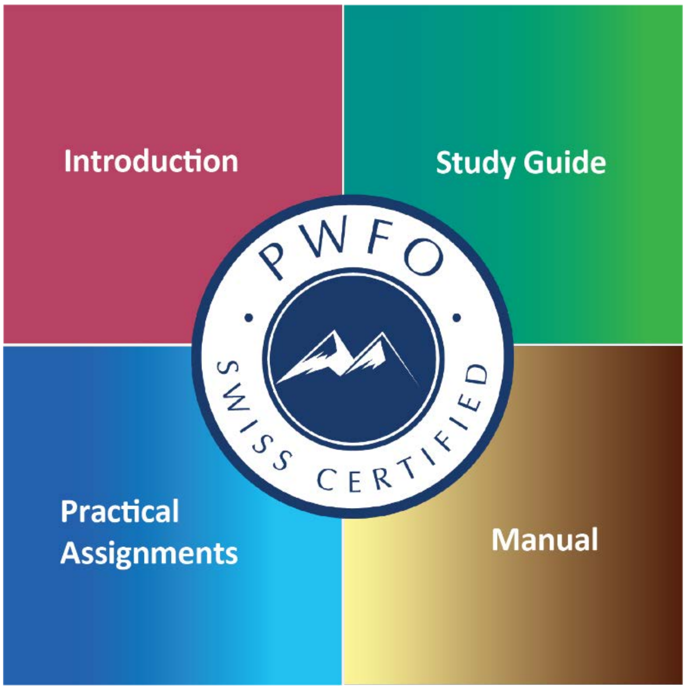
Having trained many professionals and studying the latest educational trends, it has been understood that simply listening to someone talking for hours and/or reading a textbook is quite simply not the best way to provide real impact training.

Hence this program has been re-engineered to ensure you gain real value and that you want to work with us further to support your development in your career or business in private wealth services.

By this and contrary to many other learning programs out there, we mean it will be you who will be doing the work through research and a set of practical assignments.

Of course, you will receive content through the program, but more importantly you will already have begun (or really progressed) in your journey in the world of wealth services.

Each program has several learning outcomes that are tackled through the following framework of:



INTRODUCTION

A short explanation that will investigate the reasons that we are studying these concepts and ideas, and how these may benefit you.

STUDY GUIDE

The Study Guide provides a holistic view to your study and has been designed to accompany you throughout your journey.

THE PRACTICAL ASSIGNMENTS

This is the fun part and the core of the program. It is a series of questions/scenarios that will project you into the field of a professional wealth services and/or family office practitioner.

THE MANUAL

The manual will provide relevant content for that program as curated by the Private Wealth & Family Office Association.

Whilst we do our best to ensure all of the content provided is correct, relevant and up to date, sometimes errors and mistakes still occur. If you notice anything out of place, incorrect or something you disagree with please let us know by sending an email to info@pwfo.org. We will get back to every email received.