Your family
Your wealth
Your business

Tailored services to help preserve, grow, and transition wealth

Family and Private Wealth

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00 Helping you navigate a world of family wealth in transition

As a private wealth owner, family office executive or family enterprise leader, you're navigating an increasingly complex environment. Significant wealth brings opportunity, but also important decisions across investments, family dynamics, business interests, tax, estate planning, and legacy.

The largest wealth transfer in history

The complexities go further. You're currently at the forefront of one of the most substantial transfers of wealth in history, as assets pass to the next generation. This shift can present significant challenges, but it can also create meaningful opportunities for you, your family, and your enterprise.

By taking a long-term view and aligning decisions with your family's values and goals, you can help preserve and grow wealth, support innovation and impact, and prepare your family, business and advisors for the journey ahead.

Shaping your strategy

Along the way, you'll need to adapt tax strategy, regulatory compliance, and estate planning for changes to policy and regulation as well as the evolution of the family. This means you need a team of advisors who not only provide answers in the moment but can also help you anticipate what's coming next. A team built around your needs and focused on helping you preserve, grow and transition your wealth and legacy.

At PwC, we are that team. Our specialists understand the complexities of the private wealth landscape—because we've lived and worked in it for decades. With backgrounds spanning family office members to technology entrepreneurs, we don't just decode the technical, financial challenges, but understand the human, emotional ones. We think about your wealth with the same commitment you dedicate to building it. And we stay connected with you through transitions and evolving needs, using technology and artificial intelligence (AI) to help deliver insights and support more effectively.

Built around what matters most to you

The result? Whether you're a first-generation wealth creator or sixth-generation family member, and whether you own an operating business, new venture or manage active investments, our integrated, multidisciplinary team is your front door to PwC's global expertise. We bring you seamless access to a holistic suite of market-leading services specifically designed to help preserve, grow and transition your wealth, while aligning advice to your goals, priorities and circumstances.

From tax and estate planning to investments, and from cybersecurity to continuity planning and more, we've got your needs and priorities covered, today and into the future. As you navigate a world of unique challenges and transitions, we're here to help you navigate the moments that matter

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Our Family and Private Wealth solutions at a glance

Your goals are complex: preserving, growing, and passing on wealth while effectively managing tax, regulatory compliance, privacy, security, and more. At PwC, our family and private wealth specialists understand the unique challenges you face. As a result, we've applied our collective insight and experience to build a set of differentiated, tailored solutions designed to help you navigate your priorities with confidence and clarity.

Meeting the needs and expectations of private wealth owners and families

Significant wealth brings with it a broader set of ambitions—protecting your legacy, maintaining discretion, empowering the next generation and making a lasting impact. We go beyond traditional planning with customized teams and strategies backed by a trusted global network to help you achieve what matters most, through solutions that fit your life and personal goals, not just your balance sheet.

Meeting the needs and expectations of advisors to wealthy families

As a trusted advisor to private wealth owners, families and family enterprises, you know your clients rely on you for expert guidance to help protect and grow their wealth. PwC's Family and Private Wealth solutions are designed to complement your expertise—helping you tackle complex issues, scale your capabilities and deliver even greater value. By working with us, you can deepen trust, strengthen your relationships, and meet your clients' evolving needs with greater confidence

01 Defining your strategic vision and legacy

Staying true to your **family's values and purpose** is critical not only to preserving your wealth, but also to driving innovation and creating the impact you seek to make. Drawing on decades of experience serving private wealth owners, families and family enterprises, our team can help you maintain alignment with your purpose by articulating your family's unique identity and providing tailored communication strategies to support transparency and unity within the family. At the same time, our education and NextGen development programs can empower rising leaders in your family with the knowledge and skills required to manage collective wealth, business and legacy effectively, and help prepare future leaders for generations to come.

How we can help:

- Family vision, mission, and purpose
- Legacy assessment
- Family and shareholder alignment
- Communication strategy
- Education
- NextGen development and engagement

Family vision, mission, and purpose

As family offices and owning families focus on creating future value, wealth and impact, it's essential to have a clear vision, mission, and purpose. These serve as your touchstones, guiding cohesive strategic planning in line with your values, supporting responsible ownership, and helping you pass on your legacy to future generations.

Given the importance of your vision, mission, and purpose, it's crucial that you communicate these effectively to both internal and external stakeholders, so they can understand and support your entrepreneurial goals and your efforts to have a positive future impact. To support you, our team can help with the following:

- **Identity:** Defining, articulating, and facilitating alignment on what makes your family unique, making sure that these characteristics are reflected in your business, investment, and philanthropic activities
- **Mission statement:** Creating a compelling mission statement that communicates your family's purpose and guides decision-making
- **Business and investment ethics:** Establishing ethical guidelines for your operations and investments, promoting integrity and trust
- **Family charter:** Creating a document, agreed upon by your family members, that outlines your family's core values, what the family considers important, and how family members interact with one another

Legacy assessment

As a private wealth owner, preserving and enhancing your family's legacy is likely one of your top priorities. Whether you're considering undertaking philanthropic activities or simply looking to secure your family's future, our team can support you with tailored guidance on wealth transition, governance, and strategic planning. We can work together with you and your family to provide personalized advice on managing and growing wealth, including succession planning and family governance aligned with your family's vision and values. In this way, we can help ensure your legacy endures for future generations.

Family and shareholder alignment

While internal conflicts are not unique to business-owning families, the ability to manage them is vital to the long-term wellbeing of the family, especially where multiple generations are involved. A shared mission and vision can play a key role in addressing any conflicts that arise within the family, by providing a common direction and purpose, aligning different family members' goals, and fostering a sense of unity. A further important enabler in resolving disputes is effective communication, often through a family council, which can address conflicts proactively and maintain transparency. Our team can help you navigate these challenges with the following services:

Mission, vision, and values development

Defining and articulating your shared purpose to enhance alignment and unity

Family council implementation

Establishing a family council to facilitate structured dialogue and decision-making, ensuring that everyone's voice is heard

Communication strategy

Transparency plays an important role in keeping your family united and your legacy strong. Open and clear communication can build trust and keep the family aligned on what matters most. Each family member may like to be kept informed in a different way, and we have extensive experience in creating customized communication strategies that meet these diverse preferences, including family activities that strengthen family bonds and reinforce shared values. From selecting the right technology solutions and secure platforms, to setting the most effective content, frequency and methods of conveying information, we can help you foster open communication to provide the high degree of transparency and clarity that your family members expect and deserve.

Education

Wealthy families often face challenges in educating younger family members about managing wealth, business operations, and governance. Filling gaps in financial literacy, developing a clear and shared understanding of family history, and planning transitions between generations can be difficult tasks. Preparing family members to fulfill roles in the family business or within family governance structures can also be a sensitive and daunting task.

Drawing on years of experience working with families like yours, we offer education programs that help address these challenges while supporting family unity and long-term success. Our services are designed to empower your family members with the skills and knowledge they need to manage your family's wealth, business, and legacy as effectively as possible. They include:

- Individualized family education planning
- Financial literacy and acumen training programs
- Leadership development for transition and continuity planning
- Governance and policy development
- Family office training programs

NextGen development and engagement

If you're planning to pass your family wealth and business on to the next generation, or alternatively if you're a next-generation leader yourself, you might be looking for fresh ideas to help you address today's challenges, including around digitalization and AI-driven innovation. By providing you with opportunities to learn from and network with other family business leaders, industry experts, and peers, we can bring you valuable new perspectives that will help you navigate and thrive in today's fast-evolving business environment. With this in mind, we offer several ways to help next-generation leaders meet their own unique goals and realize their full potential. Whether you're a leader, shareholder, beneficiary, or board member, you can connect and learn through our various programs and offerings.

[Learn more about all of our NextGen programs]

NextGen Academy

A one-week training event for young entrepreneurs and successors who may have already completed their studies, have some initial work experience and are aiming for a management role.

NowGen Academy

A one-week training event for entrepreneurs and successors who are in—or aiming for—an executive management role, in which you co-develop an individualized five-step action plan to power your leadership and business forward.

NowGen U

Leadership development training and peer networking with an academic lens, designed for current and future family leaders.

NextGen Impact Days

Exclusive annual gatherings offered to NextGen Network members to connect with peers, academics, entrepreneurs, and professionals from across our broad and diverse family capital ecosystem.

Talk to our team about defining your strategic foundation and legacy

Start a conversation

02 Navigating complex tax issues and compliance

Well-informed decisions on tax are essential if you're to preserve, grow, and transition your personal and family wealth securely and effectively. Yet we know from decades of serving private wealth owners, families and family enterprises that navigating complex tax regulations at all levels—federal, state and local, and cross-border—can be daunting. Whatever tax-related requirements you may have, from tech-enabled tax compliance solutions to holistic lifelong tax planning, our experienced specialists can help. We can advise you on the tax aspects of areas including direct investment strategies, ownership structuring, luxury assets, real estate, sports franchises, transfer pricing, regulatory compliance, and state and local tax matters.

How we can help:

- Tax planning
  – Federal
  – State and local
  – Cross-border issues
- Operating business and direct investments
- Tax operating model
- Legal entity and ownership structuring
- Luxury assets
- Real estate
- Sports franchises
- Transfer pricing
- Tech-enabled tax compliance

Tax planning

In today's dynamic environment, it's easy to feel overwhelmed by the complex tax issues arising from developments like shifts in regulation, changes to business structures, geographical expansion, cost reduction efforts, tightening credit markets, and increased legislative scrutiny. To take the strain off you, our team members keep themselves fully updated on each domestic and international development that might impact you and your business interests either locally or globally. We apply this insight to help you formulate and execute strong, effective and compliant tax strategies for both US and overseas investments, including acquisition, restructuring, expansion, or divestment. We can also help you stay in compliance with—and respond appropriately to—inquiries from domestic and foreign tax authorities, enabling you to manage your global structure and tax rate effectively

Federal

As a US-based resident or company, your tax compliance obligations include an intricate mix of federal and state requirements. We know from decades of experience that when it comes to tax, one size doesn't fit all. Whether you're an individual, publicly traded company, privately held business, inbound multinational, or investment fund, we recognize the unique demands imposed by federal tax compliance alongside broader personal and business objectives. We also understand that the increasing complexity of the global economy amplifies the impact of international reporting on your domestic federal tax compliance.

Drawing on this comprehensive understanding, our goal is to help you navigate direct and indirect state tax compliance and multi-country reporting requirements as smoothly and securely as possible. Our tax processes are specifically designed to promote collaboration, predictability, automation, and transparency. And our compliance specialists can provide holistic advice and services that deliver value to you beyond the tax return, enabling you to meet your federal tax obligations consistently and effectively.

State and local

Navigating **state and local tax compliance** has become increasingly complex, especially in the wake of federal tax reform and the Wayfair decision. Businesses and individuals must now adapt to evolving requirements across income, corporate, partnership, sales tax, and unclaimed property laws. To help you rise to this challenge, we can help you implement agile tax models that provide strategic insights beyond compliance—enhancing decision-making, managing risk and unlocking value. Our approach ensures you stay ahead of regulatory changes, state-specific tax policies, and shifting enforcement landscapes, helping you mitigate exposure and optimize your tax position in an ever-changing environment. Important aspects to consider include:

Effective cash tax management

Decreasing your taxable income, securing available refunds, and reducing the tax payments you're required to make

Supply chain stabilization

Taking actions to stabilize your supply chains while preparing for unpredictable levels of revenue and profitability in some of your key markets

Resource allocation

Confirming you have adequate resources available to meet the ongoing indirect and direct tax compliance obligations imposed by various taxing authorities

Flexibility and responsiveness

Focusing on responding faster and more flexibly to uncertainties that arise, to help maintain compliance and enhance the outcomes for you as the taxpayer

By adopting agile tax models and prioritizing these important areas, you can navigate the complexities of the current tax landscape and make sure that your approach to tax supports your personal, family, and business goals—while always remaining in compliance.

Cross-border issues

For individuals and families with a global footprint, navigating the intricacies of cross-border tax strategies for personal wealth planning can be an intimidating prospect. This is especially the case since tax implications vary widely depending on where your assets are held, making effective planning and compliance a constant challenge.

To ease the burden, our Family and Private Wealth team can draw on our global scale and insight to act as your cross-border advisor on tax issues—helping you structure your assets tax-effectively and implement tax-planning strategies tailored to your unique requirements. Our aim is to simplify complex international tax issues for you and provide you with the clear insights you require to make informed decisions. Here are just some of the areas where we can help:

- Trust classification issues related to foreign trusts with US beneficiaries or settlors
- Trust consulting and compliance for foreign trusts with US beneficiaries or settlors and US assets and transactions
- Coordination of different tax regimes as related to income tax as well as trusts and wealth transfer
- Pre-immigration and expatriation planning around exiting and entering the US
- Restructuring entities and trusts to mitigate negative tax consequences and reduce administrative effort
- Income and estate treaty analysis through a global lens
- Non-resident income and estate tax planning
- Planning for the purchase of luxury assets across borders
- Family office structuring and governance for global clients

Operating business and direct investments

For private wealth owners and family offices with pass-through entities like LLCs, partnerships and S corporations, business decisions can have a significant impact on shareholders and business partners. Choices made in areas ranging from corporate governance to tax planning and dividend policies can affect your family's goals, objectives, and other holdings. Our team can provide support and guidance throughout the enterprise planning process, including:

- **Cash forecasting:** Analyzing the potential implications of company cash flow, liquidity and tax planning on shareholders and business partners
- **Dividend policy:** Establishing a dividend policy that aligns with your capital planning and tax considerations
- **Entity selection:** Identifying the most tax-effective form for your business
- **Exit planning:** Enhancing your company's structure to achieve the prime sale value and after-tax results if you choose to sell
- **Governance:** Developing a strategy and guardrails to help your business(es) and investments stay on track

Tax operating model

Optimizing the tax operating model for family offices is vital in creating a more effective, compliant and strategically aligned tax function that supports the broader goals of family wealth preservation and growth. Our tax reporting and strategy professionals can help by evaluating your current-state operations, performing gap analyses, and providing future-state roadmaps and implementation recommendations. Focus areas include process streamlining, data and technology evaluations, cross-functional operations, implementing automation, and aligning resources and skills. Throughout our engagements, we recognize the uniqueness of each family office and customize our reviews and recommendations to align with your family office's overall strategic objectives.

Legal entity and ownership structuring

Operating and investment partnerships can be complex entities to manage, especially for wealth owners and family offices overseeing significant assets. Confirming that everything is structured effectively and complies with tax laws is crucial for enhancing returns and reducing risks. We can help you with the following:

- Tax compliance and consulting to maintain compliance with tax laws and regulations for partnerships
- Investment and deal structuring to support favorable partnership structuring, allocation of profits, tax effectiveness, and strategic goals
- Enhancement of flow-through structures, profit interests, and partnerships to enhance tax benefits and operational effectiveness
- Operational reviews to identify inefficiencies and improve processes

Luxury assets

You may have built up a collection of luxury assets, such as private aircraft, yachts, classic cars, or works of art. While these assets can hold significant personal value, they also raise distinct tax and regulatory considerations when acquired, operated, stored, gifted, or disposed of—and those rules can shape your broader tax strategy. For example, acquiring a private aircraft for business and personal use can trigger particularly complex legal, regulatory, and tax issues. With this in mind, it may be worth closely evaluating your travel needs to determine whether buying, chartering, or fractional ownership is the right option. In all decisions involving luxury assets, we can help you manage the tax implications more effectively, address issues around sales and use taxes, and enable compliance, while working with your legal counsel to create the most appropriate ownership structures to suit your objectives and circumstances.

Real estate

Real estate is the subject of renewed interest from family offices as they seek opportunities for income growth and long-term value amid shifting market dynamics and more favorable pricing conditions. When it comes to evaluating real estate investments, it's critical to go beyond market potential and consider how the investment fits into your broader wealth, tax, and estate strategy. Real estate often comes with unique tax rules that, when properly structured, can behighly advantageous. We can advise you on all aspects of real estate investment, ownership, and management, including:

- Tax consequences of real estate investments, including fund investments and how to mitigate negative tax impacts
- Structuring real estate deals—domestic and cross-border—for tax and operational efficiency
- Strategies to maximize depreciation deductions and use losses to offset other income
- Capital gain planning in connection with asset sales
- Tax deferral strategies, including 1031 exchanges, opportunity zones, Delaware statutory trusts, and REIT partnership contributions
- Diligence support for real estate acquisitions
- Property tax minimization
- Transfer tax minimization

Sports franchises

For families seriously considering investing in a sports franchise, understanding the broader financial and tax landscape is essential. Sports franchise values continue to rise due to limited supply, strong demand, and growing media revenues. At the same time, new ownership structures, including rising participation by private equity, are expanding access but also adding complexity. To help you navigate this shifting landscape, our team can provide structuring guidance, acquisition planning, multi-state and international tax support, deduction optimization and integration with your broader estate, as well as advising on wealth strategy in coordination with your legal team to help protect your investment and enhance returns.

Transfer pricing

Transfer pricing is a hugely complex area. So, against a background of ongoing global tax reforms, increasingly strict compliance requirements and high-stakes audits, it's easy to feel frustrated when trying to navigate the transfer pricing rules for families and family enterprises. Our team can help you develop compliant and industry-leading transfer pricing frameworks that reflect and support your personal and business goals. We offer the following services:

- Property tax minimization
- Transfer tax minimization
- Controversy and dispute resolution
- Operational transfer pricing models and reviews

Tech-enabled tax compliance

Sightline is our proprietary tech-enabled tax compliance solution. We designed and built it with the specific aim of helping you and your dedicated PwC tax team uncover further opportunities across your tax footprint and lay down the solid technology foundation you should have to support continuous growth. A global platform that provides connected tools and collaborative space for our teams around the world, Sightline brings you a centralized, end-to-end view of your overall tax process, as well as secure data transfer capabilities, enhanced insights into each aspect of your tax affairs, and document sharing that's easy and seamless. Sightline also offers you email-free collaboration linked to your chosen deliverables, and access to a platform that's continually evolving to help stay ahead of your changing tax requirements.

Talk to our team about navigating complex tax issues and compliance

Start a conversation

03 Preserving, growing, and transitioning your family wealth

For a business-owning family or family office, overseeing the preservation, growth and transfer of wealth is a high priority—one that can include direct investments, deal-making, philanthropic endeavors and trust and estate planning. To support you in all of these areas, our team can advise you on aspects including corporate development, sell-side and buy-side due diligence, continuity planning, impact investing efforts, and more—while also assisting you in navigating an ever more complex investment landscape, ensuring effective succession planning is in place, and maintaining compliance with trust and estate regulations.

How we can help:

- Investments
  - Investment policy
  - Corporate development
  - M&A
- Philanthropy and impact investing
- Continuity and succession planning
- Trust and estate planning, trust and estate compliance

Investments

Investment policy

Many families have shared investments, whether in a family business or other ventures. While these can strengthen personal bonds within the family, they can also lead to conflicts in cases where individual family members' interests aren't aligned or clear communication is lacking. An investment policy statement can help address these issues by setting out guidelines for the types of investments that can be made and the risk-and-return objectives to be pursued, in alignment with the family's mission and specific parameters, such as trust provisions. Our specialists can help you create the investment guidelines and processes needed to help ensure your family is on the same page and working toward common goals. This includes helping you:

01
Develop an asset allocation framework

02
Create an investment strategy statement and investment policy statement(s)

03
Establish clear alignment of vision, mission, and investment objectives

04
Define risk tolerances and develop risk management policies and procedures

Corporate development and M&A

When enterprising families and family offices are looking to grow their business, whether organically or inorganically, they often face challenges around having the right in-house capabilities to achieve their goals. Whether you're considering a specific acquisition or divestiture or seeking long-term support across the overall lifecycle of your investment activities, you should make sure you have the necessary capacity and resources in place to execute your **corporate development** plans. We can help you to:

Define strategic priorities and governance
To ensure alignment with the family's goals, optimize resource allocation and mitigate risks throughout the investment lifecycle

Develop investment structures and processes
To improve execution, enhance direct investment capabilities, and better manage potential market and operational risks

Identify new expansion or diversification opportunities
To drive growth beyond what can be achieved through current investments and infrastructure

Assess existing investments
To improve portfolio value and identify potential risks and underperforming holdings

Undertake sell-side and buy-side due diligence
To identify potential risks and opportunities, ensure accurate valuation and facilitate informed decision-making

Philanthropy and impact investing

When thoughtfully approached and effectively managed, philanthropy can offer meaningful personal fulfillment while also generating significant positive impact for society. Similarly, impact investing can be highly tax-effective and provide good returns while also increasing your impact.

Whether you're new to giving strategies and options or are an experienced donor or investor, we can assist you in achieving your philanthropic and impact goals—applying our collective experience to help you define the impact you want to make, decide how much to give and choose the right structure, while having complete clarity on tax deductions and realized benefits. We can also support you if you have more complex objectives around philanthropy and impact investing, such as enabling next-generation involvement, establishing educational initiatives, or selecting tax-effective charitable strategies. We can help you to:

- Identify the strategic role of charitable trusts, private foundations and other charitable structures in wealth planning
- Achieve consensus across the family on your shared philanthropic mission and purpose, as well as aligning your philanthropic, investing and estate planning goals
- Determine what giving can be done together as a family and what can be done individually, and establish the appropriate governance over family giving
- Improve the tax efficiency of current and proposed giving
- Facilitate financial and social responsibility through effective giving and impact investing strategies
- Maintain compliance with substantiation and disclosure requirements, as well as other regulatory considerations
- Design an operating model that applies enhanced technology and automation to provide the necessary level of transparency, analysis, and measurement

Continuity and succession planning

Continuity and succession planning is a vital activity that centers on shaping your family's future legacy and crafting a plan to create it. From our work with countless wealthy families over the years, we know how challenging it can be to navigate transitions, especially given the different roles that family members play: some own shares, some are actively involved in the family business or office, and all are from the family's various generations, meaning their perspectives and aspirations are likely to differ. To manage this diversity, it's crucial that you establish clear governance for both the business and the ownership group. Essential steps include defining when family members can join the business, how profits are managed, and who sits on the board for your family business or office. We can help you address these issues and more, enabling you to navigate a smooth and carefully considered route toward your family's future legacy, including:

1. Create a written family vision and legacy shared by each member
2. Conduct a family and business SWOT analysis (strengths, weaknesses, opportunities, and threats)
3. Develop a solid succession strategy for business leadership and ownership
4. Establish a clear approach to family and business governance
5. Create family employment policies
6. Define the roles of non-family executives

Trust and estate planning

Estate planning

When you think about your estate and the future of your wealth, what matters to you most? Whether it's supporting your family and loved ones today and into the future or contributing to a societal cause that matters to you, it's imperative that your wealth is passed on in accordance with your wishes. We will listen closely to your unique preferences and assist you in identifying the optimal way to realize them. While wealth transfer can feel complex, our team can help bring clarity to the process. We do this by guiding you through the key considerations to make sure your estate plan aligns with your goals, and that your legacy ultimately reflects what you value most. This includes helping you with:

- **Wealth structuring and strategies:** Supporting the effective transfer of wealth in line with your wishes while enhancing tax efficiency
- **Tax-aware planning and structuring:** Setting up the appropriate asset structure to preserve, safeguard, transfer, donate or enhance your family wealth and better support your objectives
- **Maintenance of the structure:** Managing and overseeing complex estate plans to prevent unintended estate leakage due to poor administration
- **Managing taxes and risk:** Conducting detailed reviews—including estate simulations—to manage tax issues and identify potential risks, improving your tax strategies and the benefits they produce
- **Mock 706:** Conducting thorough ‘what-if’ scenario planning to highlight any potential historical issues with the administration of your various trust vehicles that could pose additional risk or tax upon death
- **Preparing the next generation:** Providing your next-generation family members with personalized wealth education to help them understand and carry forward your values and legacy
- Charitable giving: Helping you pursue your charitable goals and aspirations with a tailored approach that generates your desired impacts while also realizing potential tax benefits

Private trust company

With a view to achieving long-term continuity and alignment with family values and goals, some private wealth owners and families choose to establish a Private Trust Company (PTC). We can help you navigate this process by providing a range of services in relevant areas such as structuring, tax planning, governance, and operations, including:

- Governance frameworks and policy development
- Experience in maintaining regulatory compliance
- Tax efficiency optimization
- Operating model design and implementation
- Risk assessments
- Tailored education programs for family members to understand their roles and responsibilities within the PTC
- Administrative support

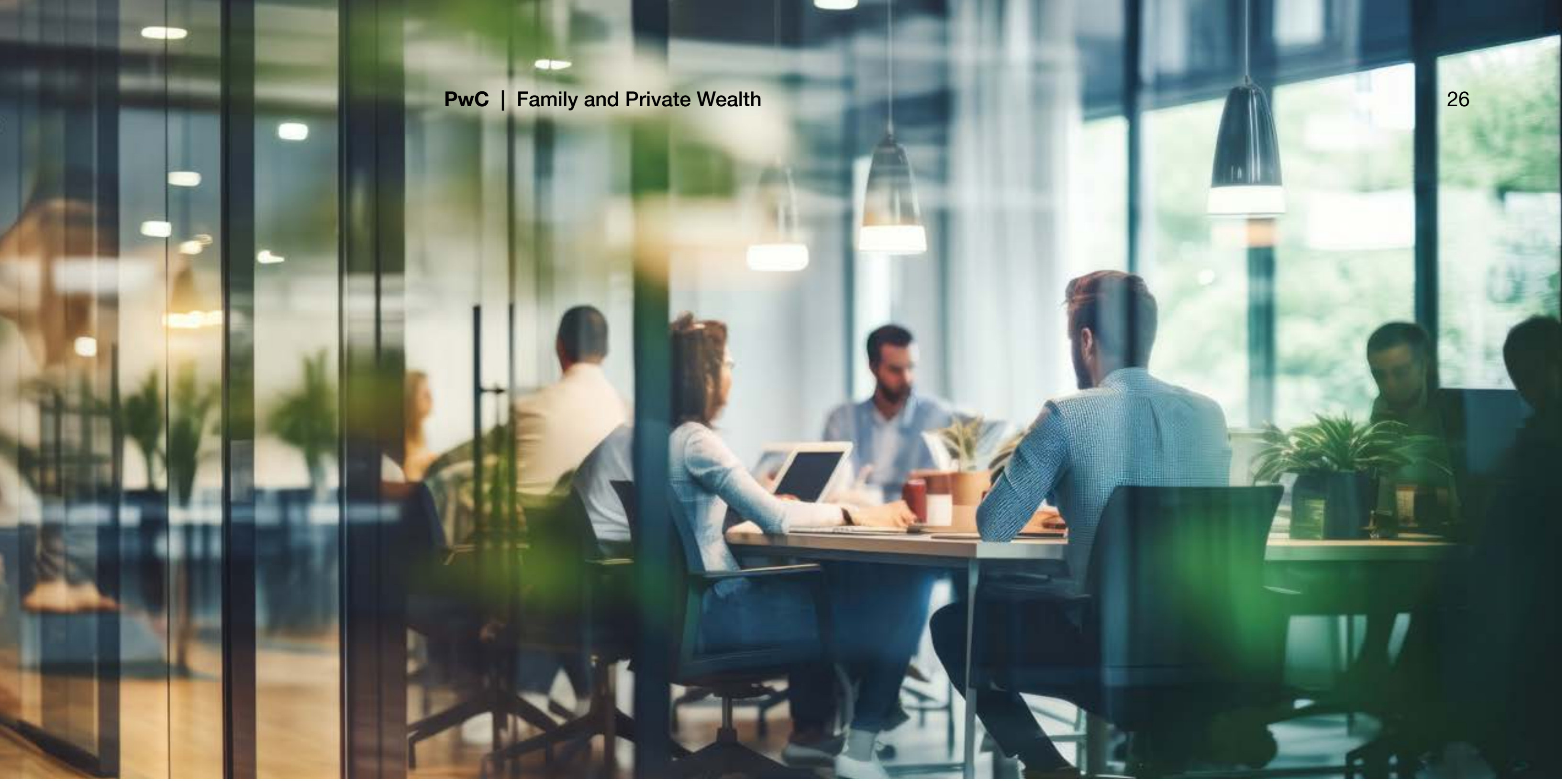
Trust and estate compliance

Whatever the future may bring, you want to be able to preserve your wealth. Trusts can play a critical role in achieving this through the tax benefits they provide. Given that today’s tax environment is so fluid, it’s important that you consider a variety of strategies regarding trusts so you can be well-positioned regardless of future tax policy changes. We can help you with trust and estate planning to support sound and compliant wealth management, including assisting you with:

- Development of an estate plan and establishment of appropriate trust vehicles
- Completion of annual tax returns
- Timely and reliable disclosure of US and international reporting obligations
- Tax estimates and payment calculations
- Direct communication with the IRS
- Direct interaction with your financial advisors, legal team and other advisors

Talk to our team about preserving, growing, or transferring your wealth

Start a conversation



04 Structuring and enabling your service and operating model

Every day, our work with private wealth owners and families reinforces that the financial demands faced by families like yours across personal and business matters are becoming ever more complex. To help manage this growing complexity, family offices are increasingly run as highly professional organizations, using timely data-driven insights to inform their decisions around investments, financial planning, operations and personnel. Whether you already have a shareholder services function embedded within your family business, are establishing a new family office, or are enhancing an existing one, our dedicated team can help you structure your family office and related functions in a way that achieves your family's unique personal and financial goals in a tax-effective way.

How we can help:

- Services for setting up a family office
  - Structuring
  - Service catalog
  - Service agreements and family office funding or compensation
  - Operating model
- Operational assessment and diagnostic
- Accounting and reporting
- Employee compensation

Services for setting up a family office

Structuring

When designing the structure for your family office, the first step is to create an overall plan that encompasses the key requirements, including its legal structure and the services it will provide, as well as details of its operations, technology, personnel requirements, advisors, and desired governance model. We can help you make the right decisions on all of these areas, working closely with you and your legal team to identify and establish a structure that fulfills your family's personal and financial objectives in a tax-effective manner.

Service catalog

Like every other family, yours is unique, and so are your goals when managing your enterprise and wealth. Meeting the objectives of your shareholders and beneficiaries effectively requires careful consideration, planning, and governance. At PwC, we know from our experience working with wealthy families that many wonder when the appropriate time is to set up a family office, what services the family office should offer, and how it should be funded. We understand these requirements in depth and have developed a holistic suite of options to help you make the right choices when you're setting up or enhancing your family office. Our team can guide you through a proven approach to tailor your family office to meet your specific requirements and help you design the infrastructure based on the latest leading practices to make sure it serves the family efficiently and effectively.

Service agreements and family office funding or compensation

When it comes to managing the costs and funding requirements of your family office, you should evaluate tax-effective service and compensation arrangements, which may include profit interests and co-investment opportunities for employees. We can help you shape and set up these arrangements. This can involve our team working closely with your legal counsel on family investment partnership tax provisions, as well as assisting you in streamlining your tax function, improving effectiveness, and confirming your family and stakeholders receive the high quality of service they expect and deserve.

Operating model

To meet the goals set by you and your family, both today and into the future, your family office must be able to manage your wealth in a nimble and effective way. This is why family offices are increasingly run on the same lines as professional businesses, relying on insights drawn from data to make well-informed decisions on investments, operations, staffing, and more. To be sure these choices are right for the family members, the managers of the family office need to be clear about what services they can provide, and the resources they need to deliver these services with consistent quality and efficiency. Our team can help you establish or improve your family office's operating model to support your family's goals as fully and effectively as possible.

Operational assessment and diagnostic

A proven way to create additional value for your family office is to assess its goals, cost and complexity drivers, and opportunities through a holistic analysis of people, processes, technology, data, and controls. We bring deep family office experience, backed by PwC's broader expertise across industries. By benchmarking your family office against comparable organizations and developing recommendations aimed at supporting your desired legacy, we can help you enhance the effectiveness of your family office and reduce risks across your family ecosystem.

Operational assessment—Cost and growth analysis

Data inputs

- Activities
- Volume drivers
- Complexity drivers
- Time spend
- Staff costs
- Non-staff costs

Data outputs

- **Staff cost/unit** Unit cost of the activities supported
- **Staff productivity** Workload volume per FTE for each activity
- **Current costs** Horizontal view of current and addressable costs
- **Current FTE workload** Current FTE workload versus current headcount

Business uses

- Quantifies the relationship between workload and staffing needs
- Forecast future costs
- Forecast future FTE needs
- Inputs can be utilized to determine the business case for new capabilities
- identifies the marginal cost of a change in volume or services mix
- Inputs to household cost and profitability models
- A component of performance measurement for support function owners

Accounting and reporting managed services

Accounting and reporting are among the most important activities for any family office. The end-to-end process can be made more complex, and often overwhelming, due to a range of factors including intricate ownership structures and large numbers of entities, accounts, and investments, as well as intercompany capital movements and trust and tax considerations.

This complexity can strain the family office's resources, leading to risks of inconsistent reporting and out-of-date data. To help you avoid these challenges, we can provide **outsourcing services** that act as an extension of your team, providing flexible, efficient, and effective support. Through these services, we can bring consistency to your accounting processes and help deliver the accurate, timely reporting outputs you expect and deserve, whenever and wherever you need them:

- Portfolio aggregation, accounting and analysis
- Bookkeeping and bill-paying
- Partnership and profits interest accounting
- Trust reporting
- Centralized document management
- Collecting K1/K3 and 1099 documents
- Stakeholder-based reporting packages

Employee compensation

In our everyday client work, we're seeing growing numbers of family offices adopt equity-based compensation arrangements to help attract and retain the top talent they need to manage their activities. This approach can enable a family office to achieve several goals at once, including incentivizing and rewarding exemplary performance and impact at both an individual and team level, aligning executives' interests with the family's investment goals, simplifying administrative and tax complexities, and balancing objective and subjective performance measures. Equity-based approaches can also be used to create a better mix of discretionary and formula-driven compensation. Our team can help you realize these benefits and more by designing and implementing a holistic reward program that is in line with market standards, uses appropriate delivery mechanisms such as deferred compensation or phantom carry, and enhances retirement planning, all while clarifying and managing the related administrative tasks.

Talk to our team about structuring and operating an effective family office or shareholder services

Start a conversation

05 Scaling your operations with technology

If your family office is facing challenges related to insufficient resources, or difficulties in automating complex processes or attracting and retaining top talent, then a big part of the solution lies in using technology to help you streamline and scale your operations. Drawing on the wealth of technology expertise available to us from across the PwC network, we can help you make the right technology choices by evaluating your current state systems, designing a technology strategy tailored to your requirements, and implementing proven solutions that can enhance your family office's efficiency, transparency and decision-making.

How we can help:

- Technology strategy and design
- Vendor selection
- Technology implementation
- Data strategy and architecture
- Cloud, digital, and AI solutions
- Client and employee experience strategy and design

Technology strategy and design

By embracing digital transformation and AI, your family office can gain a wide range of benefits, including an improved ability to handle complex investments, access precise data in real time, modernize outdated processes, manage wealth transfers, maintain transparency and address security risks. Our team can help you realize these opportunities by evaluating your current state and designing an integrated technology solution that can enhance automation, data management, and reporting across your organization. As a result, you can be better positioned to achieve your strategy in a cost-effective, scalable, and productive manner.

Cross functional capabilities

Investment (CIO)

- Custody
- Trading
- Portfolio management
- Investment research
- Investment risk management
- Attribution
- Allocation models
- Analytics and scenario analysis

Overlapping needs

- Data aggregation
- Performance
- Risk reporting
- Document management
- Customer relationship management
- Business intelligence and analytics
- Workflow

Financial (CFO)

- General ledger
- Partnership accounting
- Fund accounting
- Fiduciary/trust accounting
- Foundation management
- Tax compliance/analysis
- Bill payment
- Banking
- Financial planning
- Cash management
- Budgeting
- Human resources

Key considerations for technology selection

- Strategic planning—looking to future
- Preference and needs of the family
- Planning for additional generation(s)
- Types of entities, assets, and operations
- Skill sets and needs of employees
- New investment strategies / opportunities
- Insource vs. outsource considerations
- Operating model enhancements and decisions

Vendor selection

To deliver against the family's goals, most family offices should have a combination of various technologies and solutions that work together and complement each other. The blend of technologies being used should align with your overall strategy and meet the goals of both the family and the office. With this foundation in place, you can then leverage technology and data in smart ways to gain more transparent, consistent, and timely information that can improve your strategic decision-making and help streamline your operations. The key here is choosing the right solutions from the appropriate vendors to run your family office as effectively and productively as possible. When you're making these decisions, our team can support you with the following services:

- Assessing and prioritizing your critical technology needs, drawing on our holistic inventory of over 300 detailed requirements, together with our deep understanding of how the leading technology providers meet those requirements
- Providing insight into functional gaps and user experience through "apples-to-apples" proof-of-concept demonstrations for vendor use cases

- Confirming your requirements are incorporated, evaluated and addressed in each proposed solution through our proven question sets, scoring model and methodical approach, as well as our detailed request for proposal (RFP) process and audit trail
- Reducing the risk of unanticipated capability gaps through our market-leading process for evaluating options and choosing between different vendor solutions.

Technology implementation

Once you've selected the right technology for your family office operations, it's important to bring together the resources and skill sets you'll need to implement and optimize your chosen system. Finding the correct balance of people, processes, data, and controls is crucial to a successful implementation. To help you achieve exactly the right mix, we offer a clearly defined, human-led and tech-enabled approach to system implementation and provide you with the ongoing support needed to transform your operations effectively through technology. Our team can help you with:

- Project and program management
- System design and configuration
- Process and responsibilities design
- Development of data, testing, and cutover strategies
- Data migration
- Reporting and analytics
- Training, change management, and post-implementation support

Data architecture

Your data, in all its forms and wherever it's held, is a vital enabler for achieving your family's aspirations and legacy. Managing that data properly is crucial to strategic family discussions and sound decision-making. To maintain a firm grasp of your important information and a clear understanding of your family's wealth story, you need a holistic data strategy based on a strong data architecture. Our team can help you address the overall range of data architecture considerations, including:

Data management strategy

Creating a holistic strategy that encompasses data governance, access management and privacy, data quality, standardization, storage and warehousing, systems selection and integration, and cybersecurity

Reporting and analytics

Enhancing transparency for family members through performance reporting and insights and improved finance and accounting processes

Artificial intelligence

Leveraging AI by developing responsible AI use cases, implementing machine learning and data science solutions, and managing the associated risks

Cloud, digital, and AI solutions

In today's digital world, running your family office involves addressing multiple technology-related challenges, including complex data management, security concerns and issues around operational efficiency, flexibility, and cost management. Tailored cloud and digital solutions can help you address these challenges. We can provide you with such solutions and integrate those cloud and digital services into your existing technology setup to enable improved data management, enhanced security, and streamlined operations.

The rapid advance of AI presents further opportunities for family offices. To support you in responsibly integrating AI into your organization, PwC has created a GenAI starter kit that includes enterprise software licenses combined with sample policies and tailored steps to help you implement AI safely and ethically. We will also assist you in developing custom-built, repeatable use cases and provide training and guidance as you transform your operations.

Client and employee experience strategy and design

To catalyze and execute truly transformative change, it can be helpful to seek inspiration from outside your family or family office. Here, PwC's extensive work across multiple industries globally has given us insights into what works in terms of transformation. So, if you're looking to unlock new possibilities and drive meaningful improvements in your family enterprise or family office, you can rely on us to help you reimagine your operations. Whatever you may be seeking to achieve, our team of human experience strategists, designers and technologists can work closely with you to develop new approaches that enhance your family enterprise or office experiences. Drawing on our experience center, labs, and innovation specialists, we can help with:

01
Strategy
Confirming strategic alignment and effective activation through deep client and employee insights, creating new experience operating models, and implementing measurement and reporting systems

02
Design
Enhancing user experiences and interfaces through heuristics, information architecture design, accessibility evaluations, content strategy and creation, and digital product and service prototyping, as well as designing new and emerging experiences

03
Technology
Facilitating cloud transformation through agile experience design and development, experience architecture and engineering, and creation of innovative solutions

Talk to our team about scaling your operations with technology

Start a conversation

06 Enhancing governance and compliance

In any industry, a well-defined and strong governance model is key to maintaining clear oversight of complex legal and operating structures. This is especially true in the context of family enterprises and wealth, where the right governance is a prerequisite for effective decision-making and underpins proper management of family and business activities. Our team can help you implement and maintain the rigorous governance you require by applying our collective experience in areas including establishing effective governance structures, conducting independent audits for credibility and compliance, and developing tailored policies and procedures to manage risks while achieving both compliance and operational excellence.

How we can help:

- Governance model
- Establishing or enhancing your board
- Family policies
- Dividend policy and remuneration
- Regulatory compliance
- Audit and assurance
- Process and controls

Governance model

Good governance is a critical component of any successful enterprise—including your family business and family office. But experience shows that establishing, rightsizing, and maintaining effective governance can be challenging. As your family grows, so does the complexity of managing its interests, and your governance model should evolve in tandem. Our team of family specialists can help with a holistic range of governance considerations, including:

1. Establishing or evolving a board of directors and monitoring board effectiveness
2. Creating ownership, family governance, and decision authority
3. Instituting family office governance across investments, fiduciary duties, and more

Establishing or enhancing your board

An effective and enhanced board of directors is essential to the long-term success of organizations of all types, and family-owned businesses are no exception. A strong and well-constructed board plays a vital role by providing diverse perspectives, objective oversight, and strategic guidance aligned with your family's values and goals. We can help you enhance the composition of your board by finding and bringing together the right mix of skills and independent thinking required to navigate complex family dynamics and business challenges. By diversifying and professionalizing your board in this way, and adopting leading governance practices, you can become better prepared for future transitions, positioning you to safeguard your legacy and grow owner value in the years to come:

- **Board composition assessment:** Evaluating the current skills on the board, and identifying and closing any gaps to improve alignment with strategic goals
- **Board development:** Increasing objectivity and accountability through the creation of an advisory board and the introduction of independent directors
- **Transition planning:** Enabling smooth transitions and preparing next-generation family members for leadership roles
- **Training and development:** Developing programs specifically designed to help directors stay effective and up to date with leading practices
- **Governance practices:** Reviewing and enhancing governance structures, policies, and procedures to align with leading board practices

Family policies

To make sure that governance in your family enterprise is effective and transparent, you should put in place family policies that support engagement between your family members and help to foster cohesiveness and cooperation. We can help with this by assessing where you are today in terms of your family dynamics, and working closely with you to develop a family and business policy framework tailored to your organization and objectives.

Dividend policy and remuneration

A clear and explicit dividend policy and remuneration strategy are essential for maintaining the financial stability of your family business and providing fair returns for family members. If the policy is properly structured, it will set consistent expectations, help family members plan their financial futures, and hold management accountable for generating returns. Our team can assist with aspects including:

- Development of a dividend policy that's tailored to balance the requirements of the family business and the family members
- Remuneration strategies designed to separate ownership benefits from employment benefits, thereby helping to reduce conflicts and facilitate fair compensation
- Liquidity planning development for managing liquidity requirements using dividends and share redemptions

Regulatory compliance

Your family office may well be subject to a wide range of regulatory requirements over and above IRS compliance. We can help you achieve and maintain compliance with these rules by assisting you with identifying the requirements you need to meet, assessing the related risks, and designing appropriate policies, procedures and controls to underpin your compliance program. We have specialists with experience across all relevant regulatory areas, and can provide guidance on regulations including:

- Investment Advisers Act of 1940 (40 Act)
- Anti Money-Laundering Act of 2020 and Know Your Client (AML/KYC)
- Foreign Account Tax Compliance Act (FATCA)
- Corporate Transparency Act
- Other SEC compliance
- State and trust regulations
- Foreign regulation

Audit and assurance

For families with more complex structures—including foundations, private trust companies, and certain structured entities—there may be a requirement or desire for an independent audit. Our specialist audit services can provide independent verification of financial statements, enhancing their credibility with family members, trustees, and banks. These audits can also promote effective succession planning by giving the next generation a clearer understanding of the family's financial health. A further benefit is that they promote transparency, which can help to avoid conflicts by presenting a reliable financial picture to all interested parties.

Additionally, our audits support the tax filing process, potentially increasing the accuracy of your tax returns and avoiding possible penalties from tax authorities. For more targeted assurance on financial statements, we can also offer 'agreed-upon procedures', a collaborative approach that focuses on specific areas or processes.

Process and controls

The operating model, governance, and regulatory compliance for both your family office and family enterprise all depend critically on having the right policies, procedures, and controls in place. Our team can help you adopt a risk-based approach to developing your internal controls environment and the supporting processes, including the following actions:

- Portfolio aggregation, accounting and analysis
- Defining the risk appetite and control objectives
- Assessing the applicable risks
- Developing an appropriate mix of preventative, automated, detective, and manual controls
- Implementing controls and related processes
- Assessing whether controls are operating effectively

Talk to our team about enhancing your governance or compliance

Start a conversation

07 Managing risk effectively

Wealthy families like yours, and the family offices that manage their wealth, have always faced significant risks, and these have expanded further in recent years. Today, the risk landscape confronting you encompasses cyber threats such as data breaches and ransomware, privacy challenges such as identity theft and insider threats, as well as operational risks, market risk and other potential risks of loss. Establishing a clear process for identifying, assessing, and controlling these risks is essential for effective risk management. We can help by implementing strong cybersecurity measures, enhancing privacy protections, and providing tailored cloud and digital solutions, while also supporting your family in identifying third-party and other emerging risks early and developing effective controls and mitigation strategies.

How we can help:

- Risk management, measurement, and mitigation
- Enterprise risk management and third-party risk management
- Cyber risks
- Privacy and security

Risk management, measurement, and mitigation

To understand and manage the risks that you, your family, your family business, or your family office may face, you should first establish a clear process for identifying, assessing and controlling risks that might arise. With this in mind, our team can provide support to help families identify risks and then develop effective control and mitigation strategies. Our services include customized risk identification, tailored risk assessments, and the development of a risk and controls matrix and ongoing processes to monitor and manage risk.

Enterprise risk management and third-party risk management

For a family business or family office, **managing the risks arising from critical third-party service providers**, especially those with access to your sensitive data, is a vital task. In addition to putting in place strong governance and oversight, it's crucial to create a solid plan that includes supplier risk assessment, due diligence, contract negotiation, ongoing monitoring, and offboarding procedures.

Developing a tailored risk management framework can enable you to identify, mitigate and manage the most impactful risks across a range of areas including investments, operations, regulatory and compliance, security, and more. Our enterprise and third-party risk management team uses innovative approaches and technologies to support you throughout this process, helping you safeguard your family enterprise and wealth with confidence.

Cyber risks

Cyber risks including data breaches, phishing attacks and ransomware represent a fast-growing area of risk for every organization, and family businesses and family offices are no exception. We know from experience that family-owned enterprises can struggle with necessary security protocols, third-party risk exposures and device security, all while trying to comply with evolving regulations. To assist you in addressing these issues, our team can work with you to help implement strong security measures, educate family members and staff about security threats and procedures, and strengthen your compliance. We can help you to:

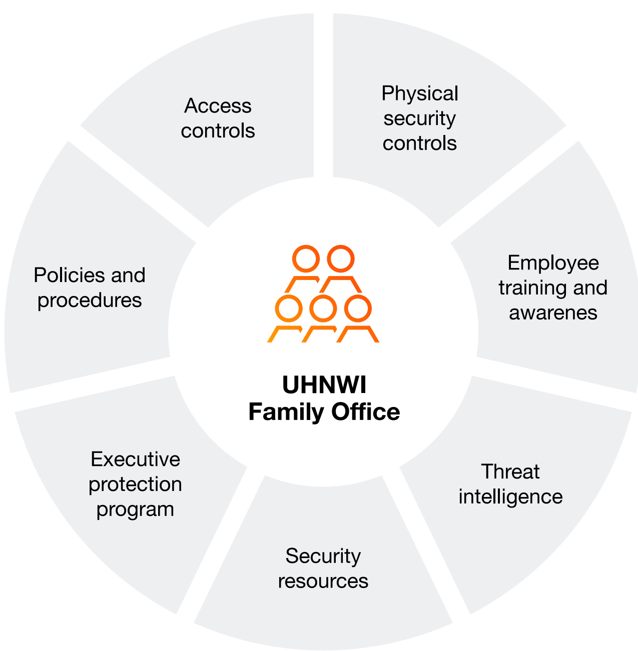
- Understand your cyber risk and develop plans to reduce it
- Leverage technology in an affordable way to improve your operations in a secure manner
- Develop policies and procedures to safeguard your digital assets
- Conduct operational digital resilience and penetration testing

Privacy and security

In addition to cyber risks, private wealth owners may also face a range of privacy and security concerns such as identity theft, insider threats, and physical security breaches. Keeping your family and its information safe while navigating complex regulations is vital. To help you have peace of mind, we can bring together specialist expertise from across the PwC network to create tailored strategies to safeguard your sensitive information and maintain your privacy. Our team can help you:

- Better safeguard your sensitive information, personal data and intellectual property
- Assess and improve the security of your offices, homes, and family members
- Determine whether tax benefits may apply after assessing the threat environment for your family members

Privacy and security framework for private wealth owners and family offices



Talk to our team about managing risk effectively

Start a conversation

Connect with us

Get in touch

What it's like to work with us

We have built our dedicated Family and Private Wealth team to help clients prepare for the journey ahead. Our core team works closely with our clients to understand their unique needs, drawing from our deep bench of family enterprise, tax and wealth planning experience. As your needs evolve, we connect you with the right specialists across the PwC network, bringing together the capabilities and perspectives needed to help you navigate complex family, wealth and business decisions.

Leadership team

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Workforce
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Dominic Cowler
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Charles Shirley
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David Pardes
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Scott Thompson
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Tax function effectiveness
Kimberly Deeb
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Maulik Patel
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Michael Blach
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Brian Rebhun
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Additional resources

Get in touch

Are you interested in starting a discussion with our team to see how we can help you?

Start a conversation

Learn more

Explore our thought leadership and sign up for insights delivered straight to your email.

- **Private company perspectives** — **Subscribe** for monthly updates
- **Tax insights** — **Subscribe** for custom tax insights

Connect

Meet with other private wealth owners, families, and family offices through our events.

- Year-end tax and wealth planning webcast
- Family Business Transitions conference series
- Heckerling Institute on Estate Planning
- NextGen programs
- Female family office executive network
- Family office roundtables

Network

Engage with us and your peers through associations and memberships.

- Family Business Magazine
- Family Wealth Alliance
- Ward Center for Family Enterprises at Kellogg School of Management
- Stanford Family Office Initiative
- The UHNW Institute
- M2 Connections, Wisdom Circle

Awards and accolades

We are proud of the recognition we've received working with private wealth owners, families, and family offices like you.

Family Wealth Report Awards

2026
WINNER Family Office Management Consultancy (Non-Tech)

2025
WINNER Outsourcing/Business Process Outsourcing

WINNER Tax Advisor

2024
WINNER Outsourcing/Business Process Outsourcing

2023
WINNER Solutions for 'International Americans'

WealthBriefing WealthTech Americas Awards

2025
WINNER Outsourcing/Business Process Management

2024
WINNER Outsourcing/Business Process Management

2023
WINNER Consultancy

WINNER Leading Individual—Danielle Valkner

2022
WINNER Consultancy

Index of solutions

Family and Private Wealth

pwc.com/us/family-private-wealth