50 Best Practices for an Enduring Family Enterprise Table of Contents

Study Intent	iiiii
How to Use This Publication	i
Best Practices Checklist	
Family Sustainability	
Continuity of the Family	
Governance and Decision-Making	13
Family Member Education and Involvement	27
Scope of Family Office Services	
Family Office Service Delivery Process	42
Integrated Wealth Planning Process	50
Investment Planning Process	60
Family Office Operations and Management	
Information Management	
Family Office Personnel	80
Family Office Infrastructure and Operations	92
Family Office Measures of Success	101
Other Resources	111

