

# Strategies for Developing Early Career Professionals in Family Enterprise

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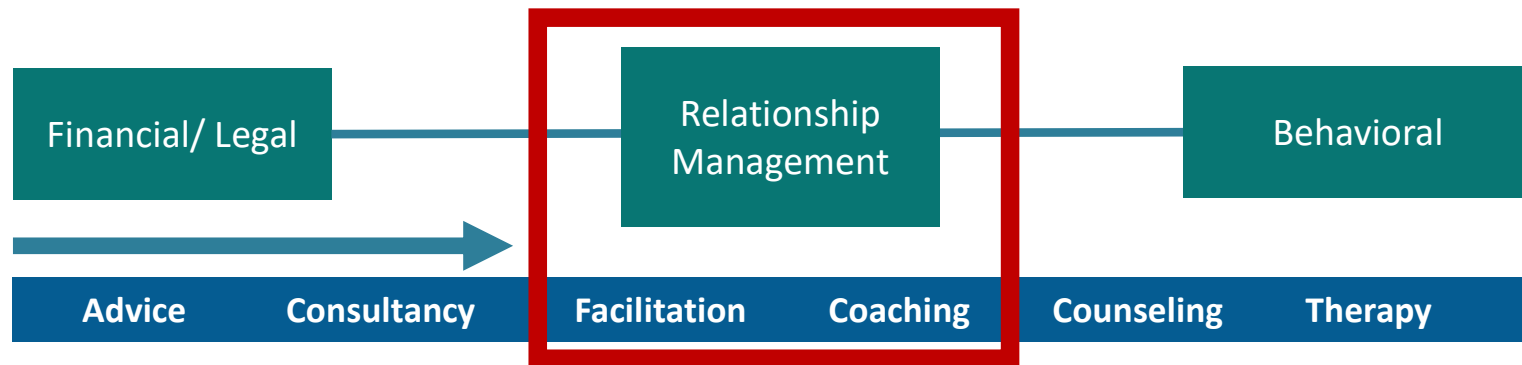
## Do you want CPE?

If you would like to receive a CPE credit for participating in today's webcast, you will need to:

1. Participate in at least three poll questions during each session.
2. Complete the feedback form that is sent to you after the program.



# Advisor Skill Development



*From the Family  
Firm Institute*

Family enterprises expect the following from their advisors:

- Comprehensive advice vs. products
- Broad as well as deep knowledge
- More openness and knowledge of family dynamics
- Well coordinated multidisciplinary team

**Slide 3**

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**JS0**

**workbook**

Jeff Strese, 2022-04-15T16:41:43.833

# Progression of Family Wealth Management

## Family Wealth Evolution\*

## Role of Family Wealth Advisors



\* Adapted from: "Wealth 3.0: From Fear to Engagement For Families and Advisors" Grubman, Jaffe and Keffeler; Trust & Estates, February 2022

INTELLIGENCE QUOTIENT (IQ)  
intellect | cognitive skills



EMOTIONAL INTELLIGENCE (EQ)  
self-awareness | social skills



# Career Path Model For Family Enterprise Professionals



Professional Maturity,  
Foundational Competencies,  
Credentialize to Advance

**Functional - Specialist**

Integrate Disciplines, Change  
Adaptive, Develop Personal  
Brand, Systems Thinking

**Advanced Practitioner**

# Family Office and Wealth Advisor Forum

July 15-17, 2024 | Chicago, IL

Register at:  
[familyoffice.com/FOWAF24](https://familyoffice.com/FOWAF24)

FOX



# Family Advisor Training Program

September 18-19, 2024 | Dallas, TX

August 27, September 10, and November 5 | Virtual modules

Register at:  
[familyoffice.com/FATP24](https://familyoffice.com/FATP24)



# E-Learning: Advisor Development 101

## Course Length:

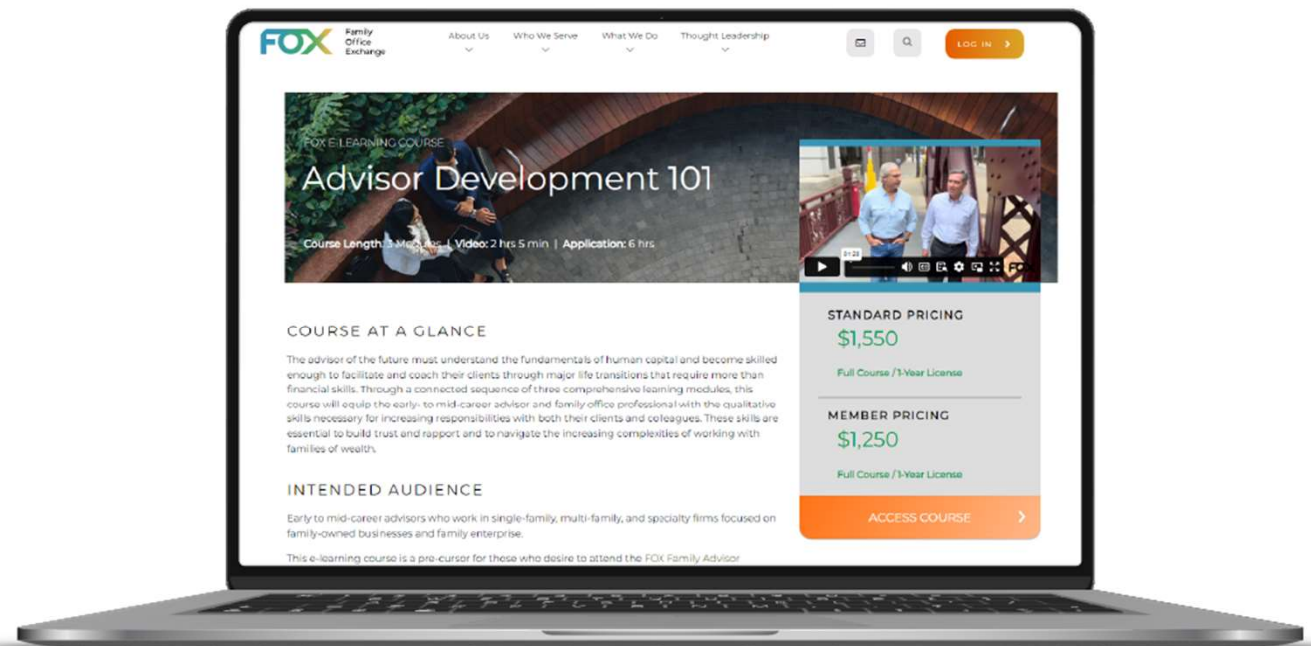
- 3 modules

## Video:

- 2 hrs 5 mins

## Application:

- 6 hrs



# Family Forum

October 28-30, 2024 | Atlanta, GA

Register at:  
[familyoffice.com/FF24](https://familyoffice.com/FF24)



# Thank You