

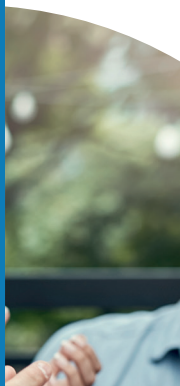
ROEF

A C A D E M Y

STARTS
JANUARY 27, 2025

RESPONSIBLE OWNERSHIP *for* ENTERPRISE FAMILIES

A unique opportunity to benefit from
a highly experienced faculty and
engage with like-minded peers



Preparing Rising Generation Enterprise Family Members
Endorsed by David Rockefeller Jr

A collaboration between





A VALUABLE CONTRIBUTION TO YOUR ENTERPRISE FAMILY STARTS HERE

Enterprise families have a major impact on society and are key to making the world a better place. The future of enterprise families depends on the rising generation. It is hard to responsibly share ownership of the family legacy, and it is complex to prosper for multiple generations.

How do you, as a rising gen, hope to contribute to your family's flourishing? What balance is possible between your own goals and those of the family? What role do you play in the family enterprise and how can you contribute? How do you become more confident and credible?

Rising generation family members have a key role in driving enterprise families forward. They share a responsibility not only to themselves but also to their families, their businesses, the people, and the world.

The Responsible Ownership for Enterprise Families (ROEF) program empowers you to prepare for a prosperous future as a rising generation family member.

'Are you ready to preserve your family legacy and make a difference in your community and the world?'

ENTERPRISE FAMILIES

Enterprise families share ownership of multiple assets (e.g., investments, real estate) and multiple entities (e.g., a family business, family offices, and/or family philanthropic foundations) across multiple generations.

WORLD CLASS KNOWLEDGE, SKILLS, AND CONNECTIONS

The ROEF Academy takes the field of enterprise family education to a much higher level. We address the unique challenges of successful enterprise families. It is an innovative, world-class program focused on empowering you to become a more successful, impactful, and inspiring enterprise family member than you ever thought possible. Learn, participate, grow, and connect for generations to come.

Those attending ROEF academy find themselves among like-minded, rising generation enterprise family members who strive to acquire skills and knowledge so that they can contribute to a better world.

Become part of a network of peers who are ready to master both financial and non-financial skills to help overcome the universal challenges of transgenerational enterprise families.

At the campus of top-ranked Vrije Universiteit Amsterdam (the Netherlands) and in Miami (USA), our innovative program provides trusted, vetted, and exclusive global participants a chance to acquire knowledge and develop the necessary skills and strategies.

'We address the unique challenges of successful enterprise families.'

The ROEF Academy is a collaboration between two world-class institutions with a wealth of experience in enterprise families: Vrije Universiteit Amsterdam (the Netherlands) and Family Office Exchange (USA).

The VU Center for Enterprise Family Research (CEFR) at Vrije Universiteit Amsterdam, studies enterprises at the family level. It is a platform of expertise on how to best prepare the rising generation to be responsible enterprise owners and decide for themselves which role they want to play in the management of the enterprise family. Family Office Exchange is an industry thought leader and the world's most advanced peer network and learning platform for multi-generational enterprise families, as well as their family office executives and advisors.

TESTIMONIALS

“

At home and in the (family) office, our discussions are now much deeper and insightful. Already halfway through the ROEF program we could see an exciting progress and development. They, for instance, initiated meetings around governance practices and ownership strategies, engaging the siblings that could not participate this year.’ Parent of participant ROEF Academy '23 - '24

“

ROEF is my compass in the world of family enterprises. With expert insights, peer discussions, and deep dives into real-world challenges, this program is a game-changer. With each session, I’m transforming into a stronger, wiser version of myself, thanks to ROEF’s wisdom. Incredibly thankful for this journey!’ Participant ROEF Academy '23 - '24

“

The faculty brings a depth of hands-on experience to the table, enriching our learning journey. Their expertise is a priceless resource that I’m grateful to tap into. Through ROEF, I’ve gained a deeper appreciation for the complexity and potential of enterprises, empowering me to identify areas for personal growth and professional development.’ Participant ROEF Academy '23 - '24

“

ROEF to me is so much more than just a program. It’s where theory meets real-world experience and where many valuable connections are made for life. I find it the ultimate blend of learning, doing, and growing and therefore it makes the perfect launchpad to my future success and that of my family.’ Participant ROEF Academy '23 - '24

“

When our family was getting itself organized, I doubt that there was any comparable compendium, so we had to learn from our own mistakes rather than the experience of others. Where were you when we needed you?

David Rockefeller Jr.
to Maarten de Groot

August 2022, New York City

A UNIQUE DEVELOPMENT PROGRAM

EMPOWERING RESPONSIBLE
FAMILY ENTERPRISE
OWNERS



GAIN USEFUL INSIGHTS

Learn practical knowledge from the brightest minds and most successful family enterprises on enterprise family fundamentals, challenges, solutions, and opportunities.



DEVELOP YOUR EXPERTISE

Develop key skills to become a responsible owner, ensuring a sustainable future and long-term positive impact.



EXPAND YOUR NETWORK

Interact with enterprise family leaders and experts from around the world and develop and engage with a renowned faculty and a global network of peers.

A WEALTH OF EXPERIENCE

YEARS OF PROFESSIONAL EXPERIENCE IN THE FAMILY OFFICE AND WEALTH MANAGEMENT SECTOR



Prof. dr. MAARTEN DE GROOT
ROEF Program Director

Expert in the field of enterprise families behind family businesses, entrepreneur with academic top-tier publications and 25 years of family office experience. Founder and director at the VU Center for Enterprise Family Research and Endowed Chair of Resilient Family Business and Enterprise Families at VU Amsterdam School of Business and Economics. Maarten brings his background as an entrepreneur, wealth manager and philanthropist and is a fiduciary board member and advisor to selected global enterprise families and their companies, foundations, or interests. He founded several enterprises, organizations, and institutions and he is the author of the book: Cracking the Code on Wealth Preservation: It Is Not About Money.



MIGUEL LÓPEZ DE SILANES GÓMEZ
ROEF Program Director

Third generation enterprise family member with family office executive experience focused on next generation owner education, advising enterprise families globally. Market Leader International at Family Office Exchange (FOX) with a focus on risk and opportunity management and crisis management for enterprise families and family offices. Miguel is a former director of the family office for one of Europe's leading real estate families. He has an MBA degree from Harvard Business School and graduated in military strategy in Chile.



SARA HAMILTON
ROEF Faculty

Thought leader with more than 30 years' experience advising global enterprise families, founder of premier family office membership organization. Founder and board member for the Family Office Exchange (FOX). Sara is a global thought leader and family advisor to several enterprise families and learning programs. She is an adjunct faculty member Private Wealth Management and Wealth Essentials course at the University of Chicago Booth School of Business. She is co-author of the book: Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times. Sara serves as an international governing board member for the Foundation for Advancing Impact and Sustainability in Bologna, Italy.



Dr. JOUKJE SWINKELS
ROEF Faculty

Seventh generation enterprise family member, member of the family board and founder of the family council. Expert in the field of sociology and assistant professor at the Faculty of Social Sciences at Vrije Universiteit Amsterdam. Joukje is involved in the committee advising and guiding both current and next generation family members (to start) working in the family business or governance. In addition, she advises societal relevant organizations with research such as the National 4 and 5 May committee dedicated to keeping memories of the Second World War alive for future generations.

DISCOVER YOUR POTENTIAL

The curriculum is meticulously designed to enhance the participants' understanding of topics relating to the family enterprise, ownership, power and governance, the family behind the enterprise, entrepreneurship and longevity, wealth preservation, and succession.



WE BELIEVE THAT HAVING THE CORRECT GROUP OF PEOPLE AROUND YOU IS ESSENTIAL TO EMPOWER YOUR GROWTH.

Upon successful completion of all modules of the ROEF program, you receive your Responsible Ownership for Enterprise Families certificate from ROEF Academy.



PROGRAM

The program offers in-person and online learning experiences. Over a 5-month period the program comprises three 5-day modules, one-on-one coaching with your personal mentor and four 2-hour scheduled online modules that will help to create a more accessible, diverse, and effective learning environment that maximizes the value and impact of the program.

With a strong orientation towards practice, complemented by powerful experiences and an inspiring and collaborative community it is designed to foster growth and learning. Join us in both Amsterdam and Miami and get ready to take the first step towards a successful and fulfilling future in your family enterprise.

- ✓ 5 MONTHS
- ✓ TWO IN-PERSON MODULES IN AMSTERDAM
- ✓ ONE IN-PERSON MODULE IN MIAMI
- ✓ FOUR SCHEDULED ONLINE MODULES
- ✓ ONE-ON-ONE COACHING
- ✓ DISTINGUISHED GUEST SPEAKERS
- ✓ CLASSES
- ✓ ASSESSMENTS
- ✓ CASES
- ✓ PROJECTS
- ✓ SIMULATIONS
- ✓ EXERCISES
- ✓ EXPERT AND PEER GROUP DIALOGUES
- ✓ NETWORKING ACTIVITIES

MODULE 1

Miami, January 27 - 31, 2025

ENTERPRISE FAMILY, FAMILY CAPITAL, AND FAMILY DYNAMICS

The first module is designed to welcome you to the program in Amsterdam, and to introduce you to the inspiring and collaborative community that will foster your growth and learning. You will meet your peers, buddies, and coaches, and discuss the importance of values, vision, purpose, and mission of the enterprise family, as well as key transitions, and enterprise family risks and opportunities. In addition, you will study and discuss key family capital and family dynamics topics including family relationships, conflict management, and ownership.

MODULE 2

Online, February 2025

OPPORTUNITIES AND CHALLENGES

In this first scheduled online module, we will dive into important areas such as goals and strategies for success, family capital and the next generation, collaboration, and the various forms of capital. We will provide unique insights and perspectives on these topics.

MODULE 3

Online, March 2025

SELF-KNOWLEDGE AND LEADERSHIP SKILLS

The third module focuses on communication, reflection, and action planning in family enterprises. We will explore critical issues and how it can impact your long-term success and that of your family enterprise. We will share unique insights and experiences on the topic of leadership, and you will gain new perspectives on how to build a legacy for generations to come.

MODULE 4

Amsterdam, March 24 - 28, 2025

ENTERPRISE STRATEGIES, SHARED OWNERSHIP, AND FAMILY GOVERNANCE

Join us in Miami, USA for the fourth module focused on succession, the generational stages, and the role of board members and of advisors. In addition, you will focus on family leadership, shared ownership, and the governance of the enterprise family, including decision making and addressing (dis)agreements through role plays. Finally, you will continue deepening your connections to your peers, buddies, and coaches.

MODULE 5

Online, April 2025

COLLABORATION AND DECISION MAKING

In this online module, we will explore the critical issue of decision-making in enterprise families and dive into collaboration and consensus building techniques. You will hear about the major roadblocks and their solution techniques and strategies, plus the role of shared decision-making and collaboration in ensuring success. You will have the opportunity to learn from several cases and gain new perspectives on how to make better decisions in your family enterprise.

MODULE 6

Online, May 2025

WEALTH MANAGEMENT AND INVESTMENT PRINCIPLES

We will set the foundation for a deeper dive into the critical topic of wealth management in enterprise families. As part of this module, we will introduce you to several key topics that will be explored in greater depth in Module 7, including investment principles and trends, and an introduction on philanthropy, impact, and sustainability.

MODULE 7

Amsterdam, May 19 - 23, 2025

WEALTH AND IMPACT, ENTERPRISE SUSTAINABILITY, AND YOUR FUTURE ROLES

This module will address the wider concept of wealth, including the purpose, impact, and your relationship with wealth. You will understand the different frameworks of wealth creation versus wealth preservation, and the tension between personal and family assets. The module will also focus on the entrepreneurship, philanthropy, and impact aspects of enterprise families. Finally, the module will summarize the key lessons and skills to allow you to develop a clear picture of your future role in the enterprise family.

PARTICIPATION REQUIREMENTS

ROEF participants are in their twenties and thirties and come from diverse backgrounds in terms of country of origin, industry, generation, and stage of development of their enterprise family. All participants want to become more engaged owners or leaders in the family business, foundation, family office, or overall enterprise.

Each class forms a cohort and consists of maximum 26 enterprise family members. Several members of the same family can participate in the ROEF program at the same time when they share the same objective of becoming more successful and sustainable as a family.

THE PROGRAM IS FOR YOU IF:

- You are eager to expand your knowledge, skills, and connections and want to make a positive impact in the world.
- You want to play a more relevant role and help your family become more sustainable and successful.
- You thrive on a diverse, dynamic, and interactive program designed to provide you with the experience and hard and soft skills needed to support your family in an increasingly complex society and challenging world.

THE APPLICATION PROCESS

All participants are selected by our admissions team to ensure that all participants form a diverse and motivated group of rising generation enterprise family members.

For admission, we consider several factors, including your personal objectives and motivation to join this program at ROEF Academy.

The exclusive character and high-end exchange of knowledge and ideas will contribute to a healthy interaction and personal and collective growth.

A personal interview is part of the admission process. We like to understand your motivation, goals, and family profile to obtain an understanding of your individual profile. We encourage early applications. The application process closes two weeks before the start of the program.

DATES TO BLOCK IN YOUR CALENDAR

Deadline for application: January 13, 2025

Module 1: January 27 - 31, 2025, in-person in Miami, USA

Module 2: February 2025, online

Module 3: March 2025, online

Module 4: March 24 - 28, 2025, in-person in Amsterdam, the Netherlands

Module 5: April 2025, online

Module 6: May 2025, online

Module 7: May 19 - 23, 2025, in-person in Amsterdam, the Netherlands

HIGH VALUE FOR YOUR INVESTMENT

The program fee for the seven modules is 25,500 euros, payable in installments. This covers the cost of the ROEF program, access to the coaching team, and all meals during the in-person sessions. You will receive unlimited access to our online learning platform and app for the duration of the program, exclusive access to speaker sessions, special events, and the ROEF Alumni Network. Furthermore, you will receive invitations to the annual alumni event and access to the biannual refresh sessions. Flights and accommodation are not included in the program fee.

JOIN ROEF ACADEMY

WE EMPOWER YOUR FUTURE AS A RISING GENERATION ENTERPRISE FAMILY MEMBER



✉ roef@vu.nl

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