

Questions to consider when evaluating your family office space

When you begin the process of rethinking your family office workspace, an important step is to ask intentional questions. The following prompts are intended to challenge you to think critically and inform the ways physical space can best serve the needs of your family office as you think about the future.

- What is your “why”?
- What is the long-term vision for your family office?
- What is working well within your current office space and what is not working well?
- What challenges are you experiencing?
- How is your family office changing and what elements are staying the same? What changes do you anticipate as you consider the future?
- How is physical workspace or the way you work in your office linked to talent recruitment or retention?
- What are your individual goals for those in the space and what are their work activities / tasks?
- What intersections exist between individual roles within your family and family office enterprise?
- How do these roles intersect with the larger team?
- Do you want your space to be “the hub” for things like collaboration and innovation?
- What education needs exist? Onboarding, training, mentoring, etc...
- Does your space need to accommodate and act as a hotel office for family members?
- Do you need to be able to house non-profit boards or meeting space for others?
- Are there any cultural and / or team building needs to consider?
- How do you build culture or nurture community?



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