

FAMILY OFFICE ESSENTIALS

a Global Family Office Community Course

Monday 18th January 2027 - Wednesday 20th January 2027
Kellogg College, Oxford University

Global Family Office Community (GFOC), now in its 15th year, is a private membership organization for Family Office Principals, Next-Gens, and Executives, with over 2,000 families represented worldwide.
www.globalfamilyofficecommunity.com

GFOC is delighted to offer this stimulating and practical course in partnership with Intrinsic Labs and Kellogg College, Oxford University. The course is a collaboration among experts from Intrinsic Labs, Kellogg College and within the GFOC community.

The three-day programme will include:

- Unique chance to network and learn from leading experts including Family Offices. As well as lectures there will be a social programme allowing you to meet your peer group informally and build relationships.
- Defining a first cut "North Star" for your Family Office.
- Fundamentals of building a robust Family Office structure, covering best practices, legal, tax, and location-related factors; essentials of investment and portfolio management; operational aspects such as staffing, hiring, and governance; and succession planning and governance best practices.

Timings

Begins: 11am Monday 18th January 2027

Closes: Wednesday 20th January 2027 at 4pm with mini graduation ceremony

- Building an enduring legacy which will pull together everything learnt throughout the course.

Topics covered will include but not limited to:

- Family Offices - an introduction
- Structuring, including tax, legal, regulatory considerations, as well as jurisdictions
- Investing and portfolio management considerations
- Operations, including technology and people
- Philanthropy and impact
- Succession planning and governance
- Family legacy and dynamics

- Topics covered will help you to build an understanding of Family Offices, as well as to consider a deep and enduring legacy for your current or future Family Office.
- 1:1 coaching will be offered to everyone attending - both before and after the course to ensure maximum benefit is received from the programme and the course can be tailored to the needs of those attending.
- A chance to study at Oxford University, one of the world's leading universities, as well as one of the most beautiful cities in the UK.
- Certified attendance by Kellogg College, Oxford University.
- A mixture of learning formats, including lectures and practical workshops.

Who should attend

- Suitable for family members from Family Offices or successful Family Businesses, their next generation members, aspiring and current family office executives.
- Those who are looking to evolve their existing Family Offices; those who are thinking of starting a Family Office and considering whether it is right for them; those who are thinking of joining their Family Office.
- Places are strictly limited.
- Accommodation and all meals at Kellogg College are included in the price. (Note: travel is not included).

GFOC is collaborating with Sharath Jeevan OBE, the Founder of The Generational Success Lab at Oxford's Said Business School, and alumnus of Kellogg College, Oxford where we will be hosting the experience. Participants will receive a co-branded certificate of attendance from GFOC, Kellogg College Oxford and Intrinsic Labs. We will be hosting a number of thought-leaders in key Family Office specialties through the residential programme.

We will also have two stimulating evening events to explore Oxford and discuss the broader themes around legacy, generational dynamics and Family Office success. These involve anything from wine tasting to novels to comedy, depending on the group's make up!

This will be a stimulating and deeply practical experience that will leave you energised, purposeful and able to articulate an exciting vision for your Family Office as well as define the initial steps to put it into practice.

You will be part of a vibrant, intimate ongoing network facilitated through our *Global Family Office Community*.

To apply, please email vahe@globalfamilyofficecommunity.com and you will be contacted for an initial discussion.