

**FAMILY OFFICE**  
ASSOCIATION



**UNITE, THRIVE, GIVE:**

Preserve Legacies While **Empowering**  
**Tomorrow** to Better the World

**MEMBERSHIP INFORMATION**



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## ABOUT

# FAMILY OFFICE ASSOCIATION

**Welcome to Family Office Association (FOA)**, an exclusive membership community dedicated to the evolving needs of family offices and wealth accumulators. Our organization, once primarily centered around hosting events, has evolved into a vibrant, family-like network that prioritizes connection, collaboration, education, and philanthropy.



## OUR CORE VISION

We believe in creating an extended family atmosphere, where our members can forge meaningful relationships, engage in collaborative ventures, and access a wealth of resources tailored to their unique needs. Our community is **more than just a network**; it's a place where multigenerational families can thrive together.

# WHAT WE OFFER

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We believe in creating an extended family atmosphere, where our members can forge meaningful relationships, engage in collaborative ventures, and access a wealth of resources tailored to their unique needs. Our community is more than just a network; it's a place where multigenerational families can thrive together.



## Networking and Collaboration

Our robust membership website, discussion forums, Peer Communities, and Masterclasses are the heart of our virtual community, providing numerous opportunities for networking. Monthly virtual member calls and our Concierge support for our Elite and Platinum levels offer a dynamic platform for members to connect, share, and grow together in a virtual environment.



## Education and Resources

A comprehensive library of resources supports our members in their journey of managing family offices and accumulating wealth. From insightful articles to in-depth reports, webcasts, Masterclasses and much more, we provide the knowledge and tools essential for success.



## Events and Experiences

Our events range from our Family Office Summits to regional gatherings, family office retreats, our FOA Kids events that truly celebrate multigenerational family members of all ages, and a range of Peer Community and special events, offering diverse opportunities for real-world engagement. Group trips to premier sports, art, and entertainment events, along with our collaboration with global family communities, offer unparalleled experiences.



## Concierge Support

Traveling to another state or country? Interested in learning a new skill or hobby? Looking for new friends for a round of golf, or need other support? Our Elite and Platinum level members have access to a designated member of the FOA Concierge team, who will be happy to help make introductions! The exception? Please note that FOA does not make introductions relating to any fundraising for investment deals, or any other "deal making."



## Mentoring and Support

We understand the importance of mentorship and support for multigenerational families. Our platform enables priceless mentoring opportunities, connections with top entrepreneurs and philanthropists, and a strong support system for NextGen leaders.

# OUR EVOLUTION

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While we continue to hold many top-shelf events, they are one part of our commitment to building a community that resonates with the spirit of an extended family. We provide a safe space for our members to not only network and learn but also to find mentorship, inspiration, and support in their endeavors.

## JOIN US

Be a part of a community that values growth, connection, and support. At the Family Office Association, you're not just joining a network; you're becoming part of a family that **champions success across generations**



# MEMBERSHIP

## FAMILY OFFICE

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This exclusive membership is tailored for established family offices and ultra-high net-worth families who have, or are seeking to implement, organized “family office equivalent” structures and best practices, supporting multigenerational success.

### Criteria

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✓ **Minimum Net Worth**

Typically exceeding \$100 million AUM.

✓ **Family Office Structure**

Either a formal family office or equivalent in place, or in the process of being established.

✓ **Investment Portfolio Diversity**

Substantial investments across multiple asset classes.

✓ **Legacy Planning**

Interest in long-term wealth preservation and intergenerational wealth transfer.

✓ **Networking Needs**

Seeking peer interactions with similar wealth and interest brackets for insights and opportunities.

✓ **Philanthropic Engagement**

While not required, active participation in philanthropy or desire to develop a philanthropic strategy is a priority for many of our members.

# “ON THE RISE” MEMBERSHIP

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Designed for individuals and families who are in the process of accumulating significant wealth, this membership offers guidance and resources to navigate the complexities of wealth growth and management.

## Criteria

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### ✓ Accumulating Wealth

Demonstrable trajectory towards significant wealth accumulation, and a commitment to establishing a family office or equivalent structure.

### ✓ Financial Sophistication

Some degree of financial literacy or willingness to learn.

### ✓ Wealth Management Needs

Seeking information and education relating to wealth protection, tax strategies, and estate planning.

### ✓ Professional Growth

In pursuit of professional development and wealth management education.

### ✓ Networking Aspirations

Looking to connect with peers and mentors for growth and opportunity sharing.

### ✓ Investment Interests

Actively engaged in or seeking to diversify investment opportunities (though FOA does not actively participate in any investment activities or deal making).

# INNOVATOR MEMBERSHIP

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The FOA Innovator Membership is designed for companies at the forefront of innovation, from seed stage to Series C and beyond. This membership focuses on fostering long-term relationships with family offices, emphasizing the importance of early and consistent interaction, thought leadership, and the mutual exchange of value within FOA.

## Criteria

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✓ Must be invited by an existing FOA member who has previously invested in the company or approved through our application process and reference checks.

### ✓ Demonstrated Innovation

Provide evidence of your company's innovative approach, such as patents, awards, recognition from industry experts, or successful product launches that have disrupted the market.

### ✓ Scalability and Growth Potential

Showcase your company's potential for scalability and sustained growth, including evidence of market traction, customer acquisition, and expansion strategies.

✓ Active participation in the FOA monthly Innovator web meetings, discussion forums, and other FOA activities made available to Innovator members.

### ✓ Alignment with FOA Values

Demonstrate how your company's mission, values, and objectives align with the values of the FOA community, such as a commitment to ethical business practices, social responsibility, and long-term sustainability.

### ✓ Track Record of Collaboration

Highlight past collaborations or partnerships with family offices, demonstrating your ability to effectively engage with SFOs and deliver value through mutual cooperation and strategic alliances.

FAMILY OFFICE  
ASSOCIATION

# MEMBERSHIP BENEFITS

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# MEMBERSHIP BENEFITS

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✓ We host MULTIPLE times PER month live private Zoom video webcasts dedicated to our members, addressing the most pressing issues of today and interviewing extraordinary thought leaders.

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✓ Once per month we host our Zoom video MasterMind Series. NO guests. Simply us, you, and your family/family office peers. We share questions, answers, and best practices.

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✓ Access to our Highly acclaimed FOA Member Handbooks well over 150 pages each: 'Sovereign Risks: Building the Moat Around the Castle' and 'Creating an Adaptive, Resilient, Anti-Fragile Family Office That Thrives Generationally.'

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✓ Gain access to all our written content, videos, and Masterclasses throughout the year regarding the evolution of money and what to expect as digital money takes over.

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✓ As an active global thought leader in the community producing original content, and with thousands of connections to the leading professionals in the community, we are here to serve our members and be there for you as a resource, problem solver and as a connector.

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✓ Q&A active participation with our thought leader guests on the video webcasts. You have a say! We announce you and your question (incoming via chat feature) or allow you, the participant, to directly ask.

✓ Access to our six hour digitally recorded Masterclass on 'Creating an Adaptive, Resilient, Anti-Fragile Family Office That Thrives Generationally.' In addition, you have access to our private library of digitally recorded Masterclasses including 'Family Offices 101.'

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✓ Online access to the community's most in-depth and wide breadth resource center that gives you access to our thought leadership, proprietary research, expert advice, how-to manuals, and ready-to-use tools and templates.

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✓ A \$2,500 credit on our Consultative Services. We help the world's most successful families create modern, multi-generationally dynamic, international family offices, that are digitally savvy, identify exponential opportunities and hazards in becoming truly anti-fragile.

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✓ You may be a guest on our live member Zoom programs if you so desire.

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✓ Access to content and resources shared by experts in the 4 hours of Consulting Service of your choice.

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✓ Invitations with a guest to ALL Private Dinners/Roundtable Gatherings in NYC, Miami, CA and other destinations.





## PEER COMMUNITIES

Family Office Association is dedicated to bringing together the world's top Family Offices, and those on the journey to significant wealth. Our Peer Communities are an extension of this commitment, offering a space for thought leadership, mentorship, and support. Each community, included in our FOA Family Office, and On the Rise memberships, **aims to foster leadership** and provide exclusive access to private events and resources.

Each Peer Community is guided by a Leadership Council, who contribute their expertise and experiences to benefit all members. We invite you to explore these communities and find your place among peers who share your passions and interests.

*Interested in becoming  
a part of our Founding  
Leadership Council?*

**Please contact us for  
more information,  
and to apply.**

# PEER LEADERSHIP COUNCIL COMMITMENT

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## Three Initial Monthly Web Meetings

Leadership Council members are asked to participate in three hour-long web meetings during the first three months of their term. These meetings are crucial for setting the direction, goals, and tone of the community.

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## Ongoing Quarterly Web Meetings

After the initial period, members are expected to continue participating in hour-long web meetings on a quarterly basis. These meetings serve to share updates, request feedback, discuss new ideas, and plan future activities.

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## Periodic Feedback on FOA Strategic Planning

Members will be asked to provide their insights and feedback on the Family Office Association's strategic planning initiatives. This may include input on marketing strategies, content creation, and collateral development.

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## Sharing of Relevant Content and Events

Leadership Council members are encouraged to share information about upcoming events, relevant news, and other content that may be beneficial to the community. This helps ensure all members are informed of opportunities and developments that could impact their interests.

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## Optional Mentorship Role

Members have the option to serve as mentors within their respective communities. This involves guiding less experienced members, sharing expertise, and contributing to the development of the next generation of leaders in their field.

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## Providing Feedback and Suggestions for Evolution

Members are committed to offering ongoing feedback and suggestions on how the community and the FOA can continue to evolve. This ensures that the organization remains at the forefront of meeting the needs and interests of all

# CURRENT FOA PEER COMMUNITIES

Section 1/4



## Global Impact

**Championing Sustainable Futures:** The Global Impact community brings together forward-thinking members of the Family Office Association who are committed to creating a positive, lasting impact on the world. This community is for those who leverage their wealth, influence, and resources to address global challenges—climate change, poverty, education, and health, to name a few. By fostering a collaborative environment, the Global Impact community encourages the sharing of innovative solutions, sustainable investment strategies, and philanthropic endeavors aimed at driving change. Members have the opportunity to participate in thought-provoking discussions, partner on impactful projects, and engage with global leaders in sustainability and social change. This community embodies the spirit of collective action, uniting members who are dedicated to making a difference for current and future generations.



## Speakers Bureau

**Elevating Voices of Leadership:** This exclusive community brings together distinguished speakers with a proven track record of delivering impactful keynote speeches and thought leadership within the single-family office community. It serves as a platform for individuals renowned for their insightful perspectives on wealth management, legacy building, philanthropy, and the unique challenges and opportunities facing ultra-high net worth families. Members are thought leaders who have influenced the single-family office space through conferences, seminars, and private gatherings, sharing their expertise on strategies for preserving wealth, innovative investment approaches, and fostering generational leadership. This community not only enhances the visibility of its speakers but also facilitates the exchange of groundbreaking ideas and best practices, contributing to the collective wisdom of the family office sphere.



## NextGen Leaders

**Forging the Path Forward:** The NextGen Leaders community is dedicated to the young, aspiring leaders of the Family Office Association, focusing on those who are set to inherit leadership roles within their ultra-high net worth family offices or wealth-accumulating families. This community offers a nurturing environment for NextGen members to explore their potential, develop leadership skills, and gain insights into managing and expanding their family's legacy in a rapidly changing world. Through mentorship programs, leadership workshops, and networking events, NextGen Leaders are equipped with the knowledge and tools necessary for success. The community encourages innovation, ethical leadership, and a forward-thinking mindset, preparing members to tackle future challenges with confidence and strategic acumen.



## Lifestyle and Wellness

Enriching Lives, Enhancing Well-being: The Lifestyle and Wellness community caters to members who prioritize their health, well-being, and the pursuit of a fulfilling lifestyle. This peer community is a source of inspiration, information, and support for those looking to enhance their quality of life through holistic health practices, fitness, nutrition, mindfulness, and stress management. In addition to health and wellness, the community explores luxury travel, culinary experiences, and the arts, offering a comprehensive approach to living well. Members benefit from exclusive access to wellness retreats, expert-led seminars, and curated events that promote physical, mental, and emotional health. The Lifestyle and Wellness community is about celebrating life, fostering personal growth, and creating an environment where members and their families can thrive.



## Real Estate Investment and Development

Shaping the Landscape of Tomorrow: This community is the epicenter for investors and developers specializing in commercial, industrial, multi-use, and various other real estate forms. It serves as a dynamic platform for ultra-high net worth individuals who are deeply involved in shaping urban and rural landscapes through innovative real estate projects. The focus extends across the spectrum of real estate development, from groundbreaking commercial complexes to transformative multi-use developments. Members exchange knowledge on market trends, investment opportunities, sustainable development practices, and emerging real estate technologies. This group not only discusses financial aspects but also delves into architectural innovation, regulatory challenges, and community impact. It's an ideal space for those committed to leaving a lasting imprint on the world through visionary real estate projects.



## Technology and Innovation

Driving the Future Forward: This community is a hub for visionaries and innovators at the forefront of technological advancement. Members include ultra-high net worth individuals and families deeply invested in the tech sector, whether through entrepreneurship, venture capital, or as enthusiasts of cutting-edge innovations. The focus is on exploring emerging technologies, sharing insights on digital transformation, and investing in the technological marvels that shape our world. It's a space for thought leaders to discuss trends in AI, biotech, fintech, and more, fostering a culture of innovation that propels their businesses and personal interests into the future.



## Alternative Investments

**Navigating Uncharted Financial Territories:** The Alternative Investments community is a beacon for Family Office Association members who are pioneering the exploration of non-traditional investment avenues. This community is dedicated to those looking to diversify their portfolios beyond the conventional, delving into realms such as private equity, hedge funds, real estate, commodities, and emerging financial technologies. Members come together to share insights, strategies, and experiences that illuminate the complexities and opportunities within alternative markets.

The community offers a platform for informational discussions on the latest trends, regulatory changes, and innovative investment vehicles, enabling members to stay ahead in a rapidly evolving landscape.

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## EB-5 Community

**Navigating Investment Immigration:** Focused on the EB-5 program, this group aids families in understanding and leveraging this path for immigration through investment. Families are often introduced to the EB-5 program as a path to their dream life, but they may not be adequately informed about the very important steps and challenges that need to be addressed in order to navigate the complex legal, tax, credit, relocation, education, insurance, social, and other aspects of the transition. We offer a special membership option for families who are applying for or who have active EB-5 applications in process.

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## Sports and Entertainment

**Championing Success Beyond the Spotlight:** This community is dedicated to professional athletes, entertainers, and established investors and thought leaders within the sports and entertainment industries. It provides a vibrant forum for members to share their unique interests and experiences, bridging the gap between the exhilarating world of sports and entertainment and the strategic finesse of financial management and investment. The focus of this community is on fostering financial literacy, mastery, and mentorship, offering access to master classes, best practices, and exclusive resources designed to navigate the complexities of wealth management in the high-stakes environment of their professions. Through collaborative learning and shared wisdom, members explore strategies for sustaining their wealth and legacy, managing transitions, and investing with impact. This peer community not only celebrates the achievements of its members in their respective fields but also supports their journey towards financial empowerment and enduring success.



## Arts and Fashion

**Curating Excellence in Creativity and Investment:** This distinguished community is designed for artists, art dealers, fashion luminaries, and savvy investors who view art and fashion not only as expressions of creativity but also as valuable assets. It serves as a dynamic platform for those involved in creating, curating, and investing in art and fashion, facilitating discussions around the nuances of the art market, strategies for art investment, and the intersection of fashion innovation with commercial success. Members have access to resources like master classes on art collection, fashion branding, financial literacy tailored to the nuances of art and fashion investments, and mentorship from seasoned experts in these fields. This peer community encourages a holistic approach to the arts and fashion, emphasizing the importance of aesthetic value alongside financial viability. It's a meeting ground for those dedicated to elevating the cultural landscape through strategic investment and visionary creative projects, ensuring members are well-equipped to navigate the markets of art and fashion with acumen and foresight.



## Veterans Network

**Honoring Service, Fostering Success:** This community unites top minds and respected leaders from the active military, veteran community, and supportive family offices passionate about making a tangible difference in the lives of those who have served. It's a collaborative platform for mentoring veterans transitioning to civilian roles, bolstering small- to middle-market veteran-owned enterprises, and sharing thought leadership on navigating the investment landscape. The Veterans Network is committed to empowering veterans, whether they are newly entering the workforce, seeking to expand their business ventures, or exploring roles as investors. Through workshops, networking events, and dedicated resources, this community provides the tools and support necessary for veterans to achieve success in their post-service endeavors. Additionally, a strong emphasis on philanthropy underlines the community's efforts, promoting initiatives that give back to the broader veterans' community and address the unique challenges faced by service members and their families. This peer community not only acknowledges the invaluable contributions of veterans but actively works to ensure their skills, leadership, and dedication are recognized and rewarded in the civilian sphere.



## FOA Kids

**Cultivating Tomorrow's Leaders Within the Family Circle\*:** The FOA Kids community is a vibrant testament to the Family Office Association's dedication to embracing a "whole family" membership philosophy. This unique community welcomes members' children, from the youngest to those up to 18 years old, who are the budding NextGen leaders of their families. By integrating family leaders as mentors, role models, and pillars of support, FOA Kids focuses on curating events and activities that enrich the family experience. Through educational programs, resource sharing, and engaging activities, this community lays the foundation for a well-rounded upbringing, emphasizing the importance of balancing professional aspirations with personal growth and family values. It's an oasis amidst our bustling lives, designed to prioritize family unity and joy, offering a plethora of opportunities for children to explore their interests, develop new skills, and forge lasting memories with their families. FOA Kids embodies our commitment to nurturing the potential of the next generation, ensuring they grow up with a strong sense of belonging, responsibility, and readiness to lead.



# NOTE TO ALL FOA MEMBERS

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As we continue to foster a vibrant and dynamic environment within our events, resource, website, discussions, and our diverse Peer Communities, including Global Impact, NextGen Leaders, Lifestyle and Wellness, Alternative Investments, and others, we are reminded of the wealth of knowledge, experience, and insights shared among us. Our communities thrive on the open exchange of ideas, strategies, and best practices, designed to enrich our personal and professional lives.

Family Office Association (FOA) is committed to providing members with informational and educational content. From discussions covering start-up ventures to insights into the stock market and various investment opportunities, our platform serves as a resource hub for learning and networking. It's imperative to clarify that within FOA, we do not engage in any deal making activities. Our community strictly adheres to a policy of non-participation in deal making endeavors.

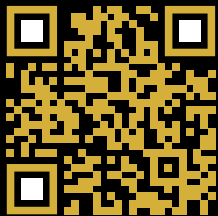
Members are reminded that all content presented is purely for educational purposes, and any engagement in deal making activities outside of FOA, including interactions with fellow members, speakers, or any other relationships formed within our network, is subject to their own discretion and due diligence. At FOA, our mission is to foster an environment conducive to knowledge exchange and professional development, empowering members to navigate their investment endeavors with confidence and informed decision-making.

***All discussions, resources, and materials provided within FOA are for informational purposes only.***

The insights and advice shared among members and through our various programs are not substitutes for professional guidance. We strongly advise all members to consult with their own professional advisors, including financial planners, legal counsel, and business consultants, before making any decisions based on information gathered from any involvement with Family Office Association (FOA). Decisions regarding investments, business strategies, legal matters, and personal wealth management should be made with the support of professional advisors who understand your unique circumstances. Our communities aim to inspire, inform, and engage, but they do not replace the need for personalized professional advice.

We are committed to ensuring that our communities remain a resource for education, networking, and support. Let's continue to share and learn together, with the understanding that each of our decisions should be guided by the expertise of our chosen professionals.

Thank you for being an integral part of our collective journey towards growth, impact, and success.



**FAMILY OFFICE**  
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