



Family Office Resilience

Value Proposition

Family Office Resilience helps multigenerational families convert governance from paperwork into durable resilience. Using two frameworks — the Primer on Multigenerational Governance and The Perpetual Mandate — we integrate financial therapy, radical transparency, scarcity–abundance balance, competency-based succession, and environmental stewardship into one operating system. The result is fewer breakdowns at succession, higher decision quality, and measurable continuity.

Board-level outcomes:

- Faster, clearer decisions through structured disclosure and decision rights.
- Reduced conflict frequency and intensity via facilitated financial therapy and protocols.
- Succession legitimacy through competency-based criteria and independent benchmarking.
- Risk-adjusted performance uplift by aligning portfolio policy with family psychology and purpose.
- Institutional memory that scales across branches, jurisdictions, and generations.



Who We Serve & Typical Use Cases

Principals & Founders

- Design an 18–24-month founder-to-board transition that preserves authority while unlocking next-gen leadership.
- Resolve 'sticky baton' dynamics with identity-aware planning and governance guardrails.
- Codify purpose, values, and disclosure cadence into a Family Constitution and Transparency Charter.

Family Office CEOs/COOs

- Implement the Radical Transparency Architecture (dashboards, cadence, access tiers).
- Stand up risk and innovation 'dual committees' to operationalize scarcity–abundance checks.
- Translate protocols into SOPs: meeting charters, decision logs, and issue-escalation maps.

CIOs & Investment Committees

- Align IPS (Investment Policy Statement) with money scripts identified via financial therapy.
- Run staged capital allocation with go/no-go gates tied to both downside limits and learning milestones.
- Introduce portfolio dashboards for adult shareholders; age-appropriate summaries for minors.



Boards & Independent Directors

- Adopt the Competency-Based Governance Criteria (CBGC) for executive and successor evaluation.
- Use external benchmarking and independent assessments to legitimize appointments.
- Establish board education on family-systems risk and disclosure obligations.

Trustees, Legal & Tax Advisors

- Map trust structures to governance bodies and disclosure rights (who sees what, when, and how).
- Embed dispute-resolution pathways (mediation → arbitration) inside the constitution.
- Audit fiduciary processes against OECD stewardship expectations and local regulation.

Next-Gen Shareholders & Rising Leaders

- Apprenticeship pathways, observer seats, and rotational assignments tied to clear competency rubrics.
- Financial literacy and resilience curriculum; portfolio simulations and scenario labs.
- Mentored participation in committees to convert transparency into practiced agency.

Philanthropy, ESG & Stewardship Leads

- Govern environmental and resource exposure with board-level accountability.
- Integrate impact metrics with family purpose and reputation risk management.
- Set policy for public disclosures consistent with principled transparency.



User Guide – Family Office Resilience (Advisor Mode Default)

1) Orientation & Stage Diagnostic (30–45 min)

- Answer five questions to classify Stage (Founder Control, Sibling Partnership, Cousin Confederation, Perpetual Mandate).
- Receive risk profile and two protocol recommendations.

2) Protocol Briefs (≤200 words each)

- Concise rationale, anonymized case, and first step for: Financial Therapy Integration; Radical Transparency; Scarcity–Abundance Synthesis; Competency-Based Succession; Environmental Stewardship.

3) Document Generator

- Instant drafts: Transparency Charter, CBGC Matrix, Diagnostic Summary, Council Charter, IPS addendum.
- Documents are editable and board-ready, versioned with change logs.

4) Implementation Sprints (6–12 weeks)

- Sprint 1: Transparency Architecture (disclosure tiers, dashboards, cadence).
- Sprint 2: Financial Therapy Integration (genograms, money scripts → policy).
- Sprint 3: Succession & CBGC (criteria, benchmarking, pathways).
- Sprint 4: Scarcity–Abundance & Stewardship (dual-lens capital allocation; environmental governance).



5) Measurement & Review

- Governance KPIs: decision latency, meeting throughput, dispute rate, participation, succession readiness.
- Quarterly retrospectives to recalibrate protocols and disclosures.

Operating Principles

- Evidence-led: align with OECD Stewardship Code (2024) and leading family-business surveys.
- Plain-language governance: translate psychology and risk into enforceable policies.
- Context before data: values and readiness precede full disclosure ('principled transparency')
- Merit with compassion: competency-based succession that honors contribution and identity.
- Systems resilience: treat financial, psychological, social, and environmental capitals as interdependent.

© Matanda Advisory – For Advisory Use Only.