

RESOURCES

Frequently Asked Questions

Answers to common questions about family offices, our services, and working with FWA.

SECTION 1

General Questions

How does FWA manage conflicts of interest with affiliated financial institutions?	▼
What is the difference between FWA and a bank's private banking unit?	▼
What is discretionary management? Does FWA offer this service?	▼
Will I lose control of my assets if I work with FWA?	▼
Who does FWA serve?	▼

SECTION 2

Working with FWA

Does FWA provide education and training for families?	▼
Can FWA help reduce family conflict?	▼
Do I need to leave my current banking relationships?	▼
Does FWA create holistic financial plans?	▼
How often will I hear from FWA?	▼

SECTION 3

Fees & Costs

How is FWA compensated?	▼
What does family office service typically cost?	▼
Are there performance fees?	▼

SECTION 4

Getting Started

What is the first step to working with FWA?	▼
What information do I need to prepare for our first meeting?	▼
How long does the onboarding process take?	▼

Still have questions?

We're happy to answer any questions you may have about FWA or family office services.

Contact Us

