

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

