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Family Office Exchange Study: Long-Range Planning Key to Tackling Risk in a Globalized World

Chicago, June 21, 2012 – Strategic enterprise planning plays a key role in enabling wealthy families and their advisors to prepare for global risks, finds a new study from the Family Office Exchange (FOX), a leading advisor to the global family wealth market.

The study, titled “Building a Family Enterprise Plan to Deal with Future Uncertainty,” is a follow-up to previous studies conducted in 2006 and 2009, and examines how long-range risk planning is integral to wealth sustainability.

The study features an enhanced version of the FOX Risk Roadmap, a comprehensive checklist of distinct but interconnected layers of risk. The latest edition of the report expands past definitions of risk to include a wide range of global and systemic issues, including:

- Terrorism
- Climate change
- Aging populations
- Pandemics
- Banking crises

Through working with hundreds of families for more than 20 years, FOX has observed that families who succeed in maintaining their wealth across generations work closely with their advisors to analyze their goals and shared assets – financial, human, philanthropic and business capital – in a strategic manner.

“The overall family enterprise plan is the indispensable organizing principle for preserving and growing the family’s wealth and risk planning is an important supporting instrument,” says Sara Hamilton, founder and CEO of FOX.

The study includes case studies on leading families from around the world that show the risk process and strategic planning in action.

“Managing risk and thoughtfully planning the family’s shared future promotes open communication, provides clarity on goals and furthers peace of mind, which is a priceless commodity in today’s world,” says Stuart Fairclough, FOX’s director of global perspectives.

“Building a Family Enterprise Plan to Deal with Future Uncertainty” is available for purchase at: <https://www.familyoffice.com/knowledge-center/building-family-enterprise-plan-deal-future-uncertainty>

It is the third in an ongoing series of FOX studies on the risk management and family enterprise planning. Previous studies in the series are available in the FOX Knowledge Center: www.familyoffice.com/knowledge-center.

About Family Office Exchange

Family Office Exchange operates a global community of private investors and wealthy families who are pursuing best practices for optimal management of their families’ wealth and legacy. The community includes over 6,000 people from 650 organizations in 20 countries who utilize FOX’s resources for advice, networking, education, and comparative metrics each year.

FOX provides strategic advisory services as well as a variety of membership options supporting families of differing experience levels – from private investors with virtual offices , those just setting up their family office, as well as business owners and multi-generational families with sophisticated, well-established offices.

Also, FOX supports an extended network of public members who can access FOX directories and FOX’s Knowledge Center with content on integrated wealth management, family office best practices, and family governance and legacy. Public members can purchase studies, participate in surveys, and attend open educational events.

FOX is headquartered in Chicago and London, with offices in New York and Boston. For more information about FOX, call 1.312.327.1200 (The Americas) or 44.(0)20.7520.9443 (Europe, Africa, Asia/Pacific) or visit www.familyoffice.com.