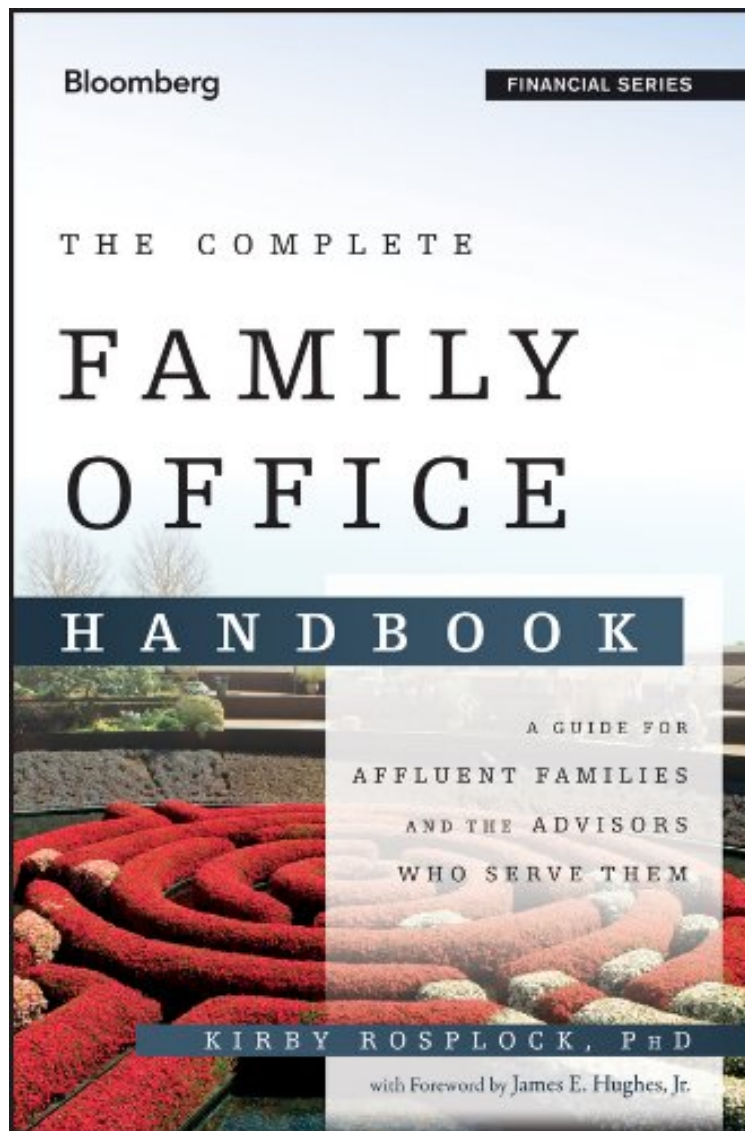


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The Complete Family Office Handbook: A Guide for Affluent Families and the Advisors Who Serve Them (Bloomberg Financial)

Kirby Rosplock

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Kirby Rosplock : The Complete Family Office Handbook: A Guide for Affluent Families and the Advisors Who Serve Them (Bloomberg Financial) before purchasing it in order to gauge whether or not it would be worth my time, and all praised The Complete Family Office Handbook: A Guide for Affluent Families and the Advisors Who Serve Them (Bloomberg Financial):

21 of 21 people found the following review helpful. Comprehensive reference and tool for family officesBy Daniel

Goldstein I have worked in the family office space for two decades as a director of a family office, leading investments and structuring, advising family businesses and managing family philanthropy. What I really like about this book is that it comprehensively covers all the core facets of a family office that I have dealt with in my career. Dr. Rosplock does this in an organized and accessible manner that informs the layperson who may have had no exposure to the field. It also serves as a reference for the experienced professional looking to supplement their own knowledge. This in no way surprises me, because I have read the same clear and organized communication in other works written by the author and heard this in numerous presentations I have attended by Dr. Rosplock to fellow family office professionals. For families that are looking to better structure what may become a family office or for experienced family office executives who are looking to educate their family principals on how to be better stewards of their own family enterprises, this book will serve as both content reference, as well as a means for communicating fundamental ideas. It takes hard work to build and sustain a family office, but that work becomes a little easier with the right tools. I give this book a five star rating because this book is a tool chest, user manual and guide (through story telling) — all combined in one. I only wish that I had had this book when I started out 20 years ago! There was nothing comprehensive available then and each family office stumbled alone in the dark to create their own separate reality, often making the same mistakes as others stumbling (unbeknownst to one another) in the dark just around the corner. No need to make those mistakes now that this book exists and you are not alone. 4 of 4 people found the following review helpful. An invaluable resource replete with evidence of genuine scholarship. By PANGEA Private Family Offices Considering the technical nature of this subject matter, Kirby Rosplock has masterfully crafted an inspirational and engaging read in this relevant guide for affluent families. I have dedicated decades of my life to this profession, read dozens on books on this topic and have even written about the private Family Office world. Dr. Rosplock has created an invaluable resource that is replete with evidence of genuine scholarship and a definite love of what she does as affirmed by the care she's applied in expertly handling the subject matter. I am moved to say; Thank you for dedicating part of your life and sharing your professional experience to create this powerful resource. Although you may never know just how many lives your work has touched, through it, the lives of many families and their successive generations will be made better because of you. One of the highest compliments I can pay to Dr. Rosplock about this body of work is that her book now has a permanent place in my private library next to my James E. Hughes Jr. collection. 2 of 2 people found the following review helpful. A Definitive resource By Mateo B. As a finance professional, this book is truly a definitive resource. From the mundane drudgery to the philosophical underpinnings of our relationship with business and capital, this guide is practical and inspiring.

Everything you need to know for successful wealth management for families Although the family office concept is not new, it is a phenomenon that is changing the wealth management landscape. With celebrities and business moguls, investment gurus and family business icons establishing private wealth management advisory firms, more and more individuals are asking what exactly is a family office and how does it operate? Family offices either serve one family exclusively or typically manage the wealth of a number of affluent families. If you're like most families and advisors, you're familiar with family offices, but may not know exactly how they work or why the family office is right for you or your clients. Dr. Kirby Rosplock, an expert on the family office concept, provides insights to some of the most common questions and even misperceptions in this handbook. The Complete Family Office Handbook explains how family offices operate, who should consider forming or joining one, and how to craft and set up a structure, purpose and vision for the office that fully serves a family's particular needs and investment goals. Whether you're a wealth creator, a member of a wealthy family considering forming or joining a family office, or a professional contemplating a career in this growing segment of the wealth management industry, this comprehensive guide provides insights to some of the most common questions and misperceptions.

From the Inside Flap After the economic downturn in 2008, many affluent families began to question how their wealth was being managed, resulting in a growing interest in the family office concept as a way to preserve their wealth. Although the family office concept is not new, it is a phenomenon that is changing the wealth management landscape. With celebrities and business moguls, investment gurus and family business icons establishing these private wealth management advisory firms, more and more individuals are asking what exactly is a family office and how does it operate? Family offices either serve one family exclusively or typically manage the wealth of a number of affluent families. If you're like most families and advisors, you're familiar with the concept of family offices, but may not know exactly how they work or whether or not they're right for you or your clients. The Complete Family Office Handbook explains how family offices operate, who should consider forming or joining one, and how to craft and set up a structure, purpose and vision for the office that fully serves a family's particular needs and investment goals. Whether you're a wealth creator, a member of a wealthy family considering forming or joining a family office, or a professional contemplating a career in this growing segment of the wealth management industry, this comprehensive guide provides insights to some of the most common questions and misperceptions. With the ultimate goal of preserving and passing on a family's wealth across generations, family offices perform three vital functions for affluent

families. They act as a keeper and executor of the family's wealth, serve as a financial confidant to the family, and act as the family's investing brain trust. These three functions involve a wide array of services, including tax, bookkeeping and fiduciary services; compliance, legal and investment management; reporting and risk management; philanthropic, education and governance advisement, and wealth transfer planning. The Complete Family Office Handbook covers the services family offices render as well as the costs a family may expect to incur in forming or joining one. The book compiles insights from leading family office executives and professionals, summarizes cutting-edge research, and describes best practices and approaches used by family offices. Finally, the book brings content to life through numerous case studies that share the experiences of families as they establish their own office or join a multi-family office, providing you with practical, real-world insights about the family office. For families and professionals who want to know more about the family office and/or how to enhance their family office knowledge and skills, The Complete Family Office Handbook offers comprehensive, practical guidance on these increasingly common but little understood enterprises.

From the Back Cover Praise for The Complete Family Office Handbook "The Complete Family Office Handbook captures the essence of today's family office and paves the way to best practice for every family and advisor entrusted with sustaining generational wealth. Kirby has written what is sure to be an industry classic." —Sara Hamilton, Founder and CEO, Family Office Exchange "The Complete Family Office Handbook is an important resource on the opaque world of the single family office. Comprehensive and easy to read, the book incorporates the views of many thought leaders on diverse topics from the importance of a family office vision to the current legal and compliance standards for the single family office. Those who are new to family offices and those of us who have worked in the field for decades will use it as a valuable reference for issues and ideas." —Kathryn M. McCarthy, Director, The Rockefeller Trust Company, N.A. and an independent advisor to families and family offices "Kirby Rosplock dedicated a year of her life to writing this book and it shows. This is the must-have book for anyone dealing with high levels of wealth—it will support wealth holders as well as wealth advisors and service providers in creating the most efficient structure possible for handling and preserving a high net worth person or family's financial and human assets. Rosplock and her collaborators clearly demonstrate their command of the subject and why they are globally known to be at the top of this industry." —Steffi Claiden, Founder/CEO, Family Office /Family Office Capital Network "Kirby blends leading industry research, real world case examples and best practices to architect the first book to comprehensively outline the infrastructure, costs and considerations for building and sustaining a world class family office. My hat is off to her." —John Benevides, President, CTC Consulting | Harris myCFO "Kirby Rosplock expertly captures the complexities of the practical and emotional choices that affluent families and their advisors face." —Susan Remmer Ryzewic, President and CEO, EHR Investments, Inc. "Most wealth books are written for managers and contain lots of details but no sense of the daily life and concerns of the people who are to be served. This Handbook is one of a kind—written for real concerned and want-to-know people. The book starts not with concepts but with concerns and offers clear ideas about what to do, laced with details about real families managing the dilemmas of great wealth and an expanding family. There are few such families, but this handbook is for every family member of such families." —Dennis T. Jaffe, PhD, Professor of Organizational Systems and Psychology, Saybrook University

About the Author Kirby Rosplock, PhD, is a recognized researcher, innovator, advisor, author, and speaker in the family office space. She understands firsthand the opportunities and challenges of family wealth as a fourth generation family business owner, board member, and co-trustee of her family's foundation. For nearly a decade, Dr. Rosplock was director of research development at GenSpring Family Offices, one of the most prominent multi-family offices in the U.S. This book shares the insights and best practices she has gained through engaging more than 60 family office experts, professionals and families with family offices around the globe into this comprehensive handbook. For additional information, visit www.Rosplock.net.