

FAMILY OFFICE MASTERCLASS OVERVIEW AND CURRICULUM

'HOW TO CREATE OR REIMAGINE INTO A TOP 1% FAMILY OFFICE''



ANGELOROBLES // @FAMILYOFFICE

WE DESIGNED A SERIES OF THE MOST IMMERSIVE, RESULTS DRIVEN, COMPREHENSIVE MASTERCLASSES EVER WITHIN THE FAMILY OFFICE COMMUNITY.

BY JOINING THESE MASTERCLASSES, YOU'RE NOT JUST PARTICIPATING - YOU'RE ACTIVELY FUTURE-PROOFING YOUR FAMILY OFFICE.



"ANGELO IS THAT RARE TRANSFORMATIONAL THINKER 'SEEING AROUND CORNERS,'
BUT WITH PRACTICAL STRATEGIES TO PREPARE FOR IT NOW"
- MERRIAM FAMILY TRUST"

FAMILY OFFICE MASTERCLASS

The family office industry has experienced remarkable growth and transformation in recent years, evolving into a pivotal force within the global financial landscape.

This growth has led to the creation of numerous family offices, each tailored to address their beneficiaries' unique needs and aspirations. As the number of ultra-high-net-worth individuals and families continues to rise, the demand for specialized services has surged.

However, amidst this rapid expansion, a notable gap has emerged—the absence of comprehensive educational resources and platforms that equip family office members and professionals with the knowledge, strategies, and insights necessary to excel in this dynamic environment.

A man with a beard and a dark suit is sitting in a modern, well-lit lounge. The room features wood-paneled walls, a large window with a black grid pattern, and a beige sofa with blue and white pillows. The man is smiling and looking towards the camera.

ANGELO ROBLES

Angelo Robles, founder and former Chairman of the Family Office Association (FOA), exit 2023, recognized this imperative need and embarked on a journey to bridge this gap through the inception of Family Office Masterclass. Angelo has created and reimagined dozens of high-functioning family offices worldwide and created the Family Office Masterclass series under the educational vertical of his SFO Continuity.

THE PROBLEM AND THE SOLUTION

Existing educational resources for creating or reimagining family offices have been underwhelming, leading to mediocre standards in many family offices.

Additionally, The need for global insights, best practices, and creative thinking within the community highlights a gap.

Angelo and his faculty aim to redefine this scenario with immersive and the highest-quality Family Office Masterclasses. These comprehensive curriculums provide concise, actionable insights, strategies, and best practices through lectures, exercises, case studies, and extensive Q&A that bring to the surface the behaviors/processes/systems/attributes/actions that lead to more successful results.

HOW TO CREATE OR REIMAGINE INTO A TOP 1% FAMILY OFFICE

YOU RECEIVE

- 24/7 Digital Access to the Multiple Masterclass Video Modules
- PDF of the Presentation

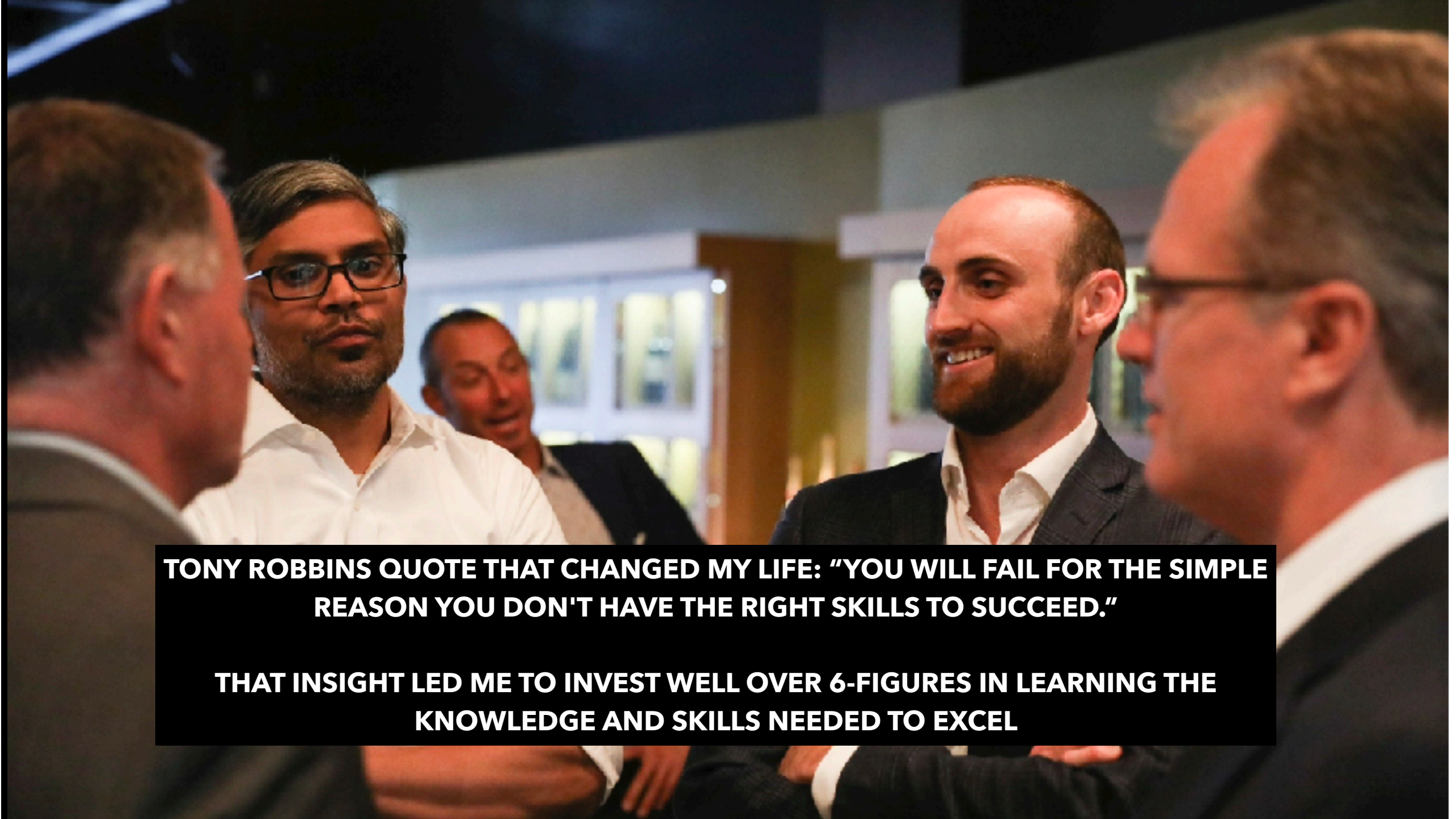


WHO ARE THESE MASTERCLASSES FOR

Ideal for wealth creators, family members, family office executives, aspiring family office professionals, and advisors to the family office community. Suitable for those seeking to enhance their knowledge and resources within the family office community.

ABOUT THE MASTERCLASSES

The Family Office Masterclass offers a transformative experience in which Angelo Robles and his faculty share practical insights, strategies, and best practices. These immersive Masterclasses include lecturers, group exercises and case studies that equip participants with the critical thinking skills, global connectivity, and tech savviness needed to excel in the evolving family office landscape.



TONY ROBBINS QUOTE THAT CHANGED MY LIFE: "YOU WILL FAIL FOR THE SIMPLE REASON YOU DON'T HAVE THE RIGHT SKILLS TO SUCCEED."

THAT INSIGHT LED ME TO INVEST WELL OVER 6-FIGURES IN LEARNING THE KNOWLEDGE AND SKILLS NEEDED TO EXCEL

MASTERCLASS CURRICULUM

SECTION 1 (PAGE 10)

- How Many Family Offices / How Much AUM?
- What's a Single Family Office? Prime Directive?
- It's All About Results / Procuring Positive Outcomes
- 'Long Resilience' / Why 2019 Matters
- Where There is Light Shadows Can be Expected!
- The Research Says 'Wealth' Transfer/Family Continuity
- Preparing Descendants (Not Good Enough)
- Being Bold / Creativity / First Principles Thinking
- Optimize Function Ignore Form /// This is How You Learn to 'Think For Yourself'
- AI This Will Get Interesting in 24 Months Get Ready!

SECTION 2 (PAGE 33)

- Family Complexities and Threats: It's Scary
- The Big 3 Concerns of Family Offices!
- Don't Be Tired. Impoverished. Vulnerable. Ineffectual.
- The Savviest Family Offices Share Insights
- 1,000 Years of European Continues Wealth. Interview Notes With Octavian Pilati

SECTION 3 (PAGE 48)

- Avoiding Stupid Mistakes Vs. Being Smart
- Problems CONSUME Time + Energy Equating to Resources (Money)
- Are You Solving the Wrong Problems? DOOMED
- Identifying the RIGHT Problems AND Opportunities
- People. Technology. Systems.
- Are You an Historian or Revolutionary? Seeing Around Corners
- You Rarely Have a 'How' Problem, You Have a 'Who' Problem /// Here's What To Do
- Jocko and Extreme Ownership. WOW is He Right

SECTION 4 (PAGE 59)

- Known Knowns and Unknown Unknowns (They Should Scare You)
- Are Your Assets Really Safe? They're Not
- It's the Bus You Don't See
- Deca Billionaires Buy/Create Banks/Insurers
- 7 Core Areas of Focus for Family Offices

MASTERCLASS CURRICULUM

SECTION 5 (PAGE 73)

- The MASSIVE Family Office Advantage!
- This Builds a Family Empire
- Why This Time Might Really be 'Different'
- U.S. Hegemony Going Away? What To Do
- Global Wealth Report: Investments of Family Offices
- Investing Insights From a Billionaire

SECTION 6 (PAGE 95)

- Character Courage and the Rising Generation
- Chief Learning Officer
- Money/Legal/Family - 60/30/10 = Problems

SECTION 7 (PAGE 107)

- Improving Through Crisis
- Legal Structuring Trends of Family Offices
- The Virtual Family Office (And Why They Often Fail)
- Can We Do This Internally? Excellently? Should We?
- Playing 'Chess' International Domiciles That Work!
- Family Governance and Synchronization

SECTION 8 (PAGE 127)

- Great Family Offices (3%) Do This!
- Why Family Offices Fail
- Practice Management Hack Re-Prioritizing Daily
- 90% of People/Family Offices Useless/Confuse You
- Any Family Office Will Be Successful if it Can Answer These 6 Questions
- Difference Between Chief People Officer and HR
- Biggest Mistake in a Family Office (Can You Recover From This?) BONUS Second Biggest Mistake
- **NUMBER ONE THING TO TURN AROUND ANY FAMILY OFFICE IN 30-DAYS**
- Secret to Your Team's Successful Outcomes

SECTION 9 (PAGE 164)

- Honestly You are WAY Too Slow: Change That 7 Days
- KPI's ...OKRs... Flow
- Most of What You Know is Wrong and What's Right...
- Important Assigning Probabilities to Outcomes
- BONUS SECTION!!! FAMILY OFFICE TECH

HOW TO CREATE OR REIMAGINE INTO A TOP 1% FAMILY OFFICE

In my 'How to Create or Reimagine Into a Top 1% Family Office' Masterclass I share with you the best practices of the world's most successful families/family offices!

I share the Behaviors/Processes/Systems/Attributes/Actions of the top 1% family offices... that lead to EXCEPTIONAL results

In this Masterclass I condense in several hours what I learned in over 20-years traveling the world researching, interacting, and consulting to family offices in North America, Europe, Latin America, Africa and the Middle East

HOW TO CREATE OR REIMAGINE INTO A TOP 1% FAMILY OFFICE

The family office must proactively coordinate internal and external resources to manage a family's wealth and resources (their empire). The family office evaluates and mitigate risks (financial, operational and behavioral), considers 'what ifs' and navigates through Black Swans to procure positive outcomes

In the end the family office is tasked with results!

I don't want to teach you 'what to think,' however HOW to think critically in the family office

In my travels and knowing 2,000 plus family offices, only 3% are excellent. Average family offices want to be left alone, great family offices want to be better, they want mentoring and to be told the truth

HOW TO CREATE OR REIMAGINE INTO A TOP 1% FAMILY OFFICE

Over two-thirds of all family offices have been created this century and the majority of these newer family offices since 2019! They are woefully underprepared for turbulent times. Generationally successful family offices illustrate 'long resilience,' and can't be kept down... those who have not prepared for long resiliency, react to adversity accordingly

What's one lesson I learned from close alignment and being in the trenches with the world's leading families and their family offices? Focus on identifying and executing on the RIGHT problems/opportunities is far more important than wasting time, energy and resources on the wrong problems (happens way more than you think) and mediocre opportunities

Successful family offices understand the big three in a successful family office:
People/Technology/Systems

HOW TO CREATE OR REIMAGINE INTO A TOP 1% FAMILY OFFICE

About 85% of success will come down to the 'people,' a strong determinant to success is them being conscientious. People drive accountability, leadership, culture and strategy

There are practice management techniques to enhance productivity and results among the people in the family office including implementing KPIs (key performance indicators) and OKRs (objectives and key results)

I even share the number one action that any family office can easily implement to enhance results within 30 days!

We leave nothing unturned in this Masterclass

We discuss the three biggest concerns of family offices around the world and ways to mitigate these concerns

HOW TO CREATE OR REIMAGINE INTO A TOP 1% FAMILY OFFICE

You will understand the 7 core areas of focus of family offices and strategies to achieve excellence in all of them (including asset protection and investing)

Structuring the family office to be legally sound, rising generation dynamics, family governance, family office tech, etc. I prepare you!

We share lessons from a 1,000 year European family of continues wealth including what they define as the greatest threat to the family (and what they did to overcome this)

'Unknown Unknowns' should be an area of concern, 'it's the bus you don't see that gets you,' however we share what you can do to foster anti-fragility in the family and the family office (this goes beyond resiliency)

HOW TO CREATE OR REIMAGINE INTO A TOP 1% FAMILY OFFICE

We take a page from Jeff Bezos and share his public comments on decision making and speed. I agree completely. I extrapolate on this as most family offices are WAY too slow, in particular to seize opportunities. We discuss decision making and SPEED and how to change that culture

MASTERCLASS TESTIMONIALS

"Angelo is that rare transformational thinker 'seeing around corners,' but with practical strategies to prepare for it now."

- Merriam Family

"Angelo Robles is undeniably a trailblazing thought leader. His Masterclass is a powerful journey that seamlessly weaves together vast insights from both the immediate landscape and historical perspectives. The experience is provocative, powerful, and precise. His extraordinary depth of wisdom and exceptional critical thinking set him apart."

- Danielle Patterson

MASTERCLASS TESTIMONIALS

"If you are a family office professional like me (or one who aspires to be), or you are in a service industry that needs to keep current on the unique world of SFOs, and you are on the fence about signing up for Angelo Robles' Masterclasses, think no more and just do it! I have over 20 years of experience as both the CEO/CFO of a multibillion-dollar SFO and as an independent advisor, and I couldn't write notes fast enough to keep pace with the information that flows from Angelo's Masterclass!"

- Joanna Roland, SFO Advisor

ABOUT ANGELO ROBLES

Angelo Robles is the Founder & Chairman of Angelo Robles Enterprises, which includes as its family office enterprise holdings SFO Continuity and Family Office Masterclass. His core membership, coaching and masterclass offerings are built around exceptionalism in the family/family office, best practices and family continuity.

Angelo has created and reimagined dozens of family offices for the world's most successful families. Angelo guides these families on creating and sustaining generationally dynamic and engaging family offices that are humanly wise, cognitively flexible, digitally savvy, AI enhanced and authentically anti-fragile.

Angelo is the Founder of Family Office Association (FOA). He built FOA to become one of the world's most valuable educational and consultative membership organizations dedicated to family offices. In 2023 he sold his final interests in FOA.



Angelo is the author of the book "Effective Family Office" and co-author of the book "Maximizing Your Single Family Office." Angelo maintains a thought leadership series for family offices on his "The Angelo Robles Podcast" on Apple and Spotify and FamilyOfficeTV on YouTube and other platforms. Angelo has written or co-written over 40 research reports, white papers and handbooks on wealth and family offices.

He has been a source to media outlets like Bloomberg News, Wall Street Journal, Institutional Investor, Family Capital and many others.

Angelo is the creator of the “Family Office Masterclass” series and has lectured, educated and consulted on a myriad of masterclass topics dedicated of success, wealth and family offices including:

- How to Create or Reimagine Into a Top 1% Family Office
- How to Implement a Direct Deals Strategy Into Your Family Office
- How to Smartly Implement a Bitcoin, Crypto, web3 Strategy Into Your Family Office



For decades Angelo has interviewed some of the world's most successful people either at his events or podcasts including Tony Robbins, Sam Zell, Michael Saylor, Jeremy Grantham, Peter Diamandis, Tosca Musk, Kathy Ireland, Jay Hughes, Lance Armstrong, Larry Holmes, General Wesley Clark, Founding Seal Team Six Commander Dick Marcinko and many others.

In addition, Family Office Association, during his tenure, has hosted to speak Ray Dalio, Steve Cohen, Paul Tudor Jones, Peter Thiel, Mike Milken, John Paulson, Bill Ackman and many others.

This culminated in Angelo creating one of the world's most valuable educational and consultative membership organizations dedicated to family offices.

Contact Angelo



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