## Programs for Owners, Families, or Entrepreneurs

### Building a Legacy: Family Office Wealth Management
- Executives from a family office or wealth management office
- Family business owners, beneficial owners, and other family members
- Not appropriate for investors not representing a family’s interests

### Families in Business
- Individuals or family business teams that reflect multiple generations and genders, as well as executives from the family office for wealth management
- Teams may also include non-family senior executives

### Launching New Ventures
- Entrepreneurs launching their own startup
- Executives responsible for jump-starting innovation in established firms

### Owner/President Management
- Business owners/founders who:
  - Have at least 10 years of operating experience
  - Serve as CEOs, COOs, presidents, managing directors, or executive directors of companies in which they own a significant equity stake

### WHO SHOULD ATTEND

**WHAT YOU WILL LEARN**
- Manage tensions between family dynamics and investment decisions as you design an effective wealth management strategy and structure that meets your family’s goals.
- Explore governance, structure, and investment challenges unique to families and discover new approaches for managing and preserving family wealth.

**KEY BENEFITS**
- Establish the right structure, governance, and organizational design for a family office
- Separate operating assets from family office assets
- Make financial decisions based on clear goals that reflect the family’s priorities and principles
- Plan and execute successful intergenerational transfers
- Explore the full range of investment opportunities
- Evaluate philanthropic pursuits, partnership opportunities, and different models for investing for impact

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**WHAT YOU WILL LEARN**
- Join family members and colleagues to explore challenges and opportunities unique to family businesses—and create an action plan for ongoing success. Establish business policies, communication practices, and family business structures that drive high performance, shareholder loyalty, and healthy family relationships.

**KEY BENEFITS**
- Formulate better strategies for growing the company and strengthening competitive advantage
- Manage expectations for the family’s involvement with the business
- Find better ways to reach common goals and address conflicts
- Structure ownership and distribute wealth optimally to benefit the family and the business
- Create a strong board of directors
- Develop succession plans and successfully navigate leadership transitions

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**WHAT YOU WILL LEARN**
- Prepare to conceive, launch, and grow a successful new venture. Acquire the analytical, financial, and managerial skills needed to make sound investment decisions, manage rapid change, build competitive advantage, and ensure the success of your new enterprise throughout its lifecycle.

**KEY BENEFITS**
- Analyze, prioritize, and determine the feasibility of new product and business ideas
- Evaluate risks, competition, and required resources
- Pitch your venture to potential investors and other stakeholders
- Evolve your leadership approach to manage ongoing innovation, radical change, and growth
- Recruit and develop the talent needed to support an entrepreneurial mindset and effort
- Balance vision and pragmatism as you pursue growth

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**WHAT YOU WILL LEARN**
- Grow your abilities and prepare to take your company to the next level. Through three units that span 24 months, acquire new confidence, an expanded entrepreneurial toolkit, and new leadership insight that equip you to drive immediate and long-term success.

**KEY BENEFITS**
- Understand the key drivers of your business as you work to maximize competitive advantage
- Identify and balance personal and professional goals with the help of self-assessment and one-on-one coaching
- Capitalize on disruptive innovation and rapid change
- Formulate optimal financing strategies that drive growth
- Identify and exploit opportunities locally and internationally
- Build an enduring network with entrepreneurial peers worldwide

* Upon program completion, participants will become HBS alumni