

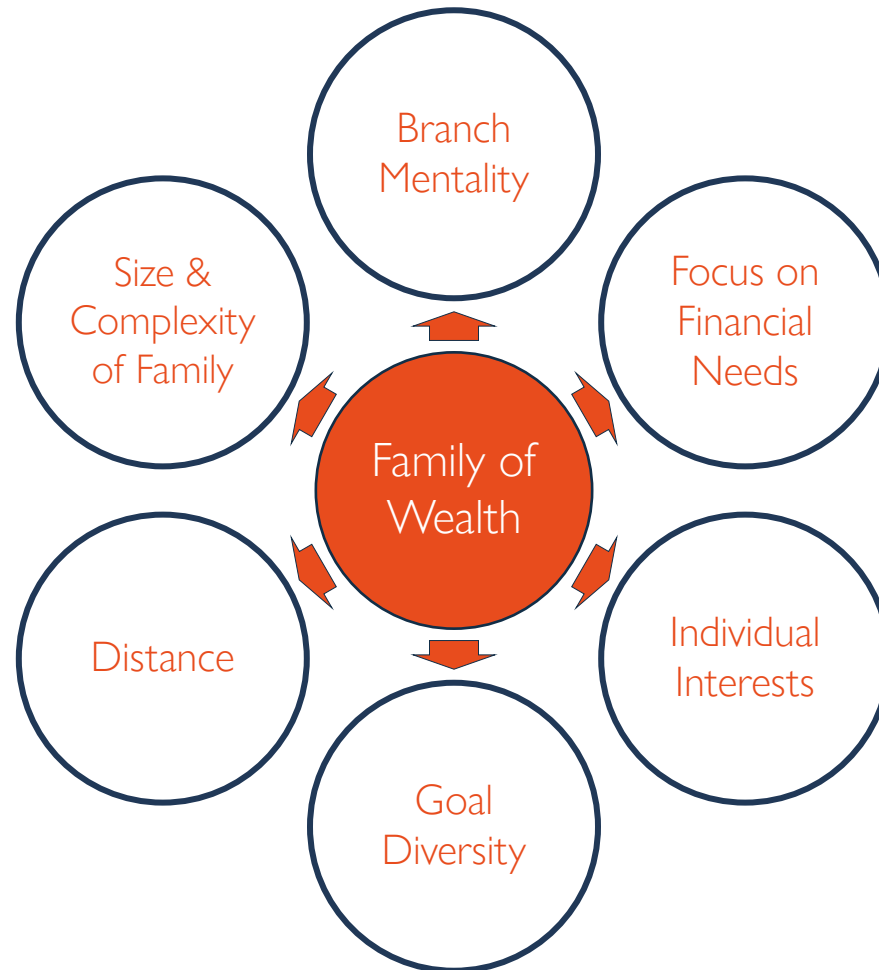
THE FAMILY BEHIND THE OFFICE:  
REIMAGINING WEALTH AND  
SERVICE FOR THRIVING FAMILIES  
AND LASTING LEGACIES

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# GROWING FAMILIES GROW APART

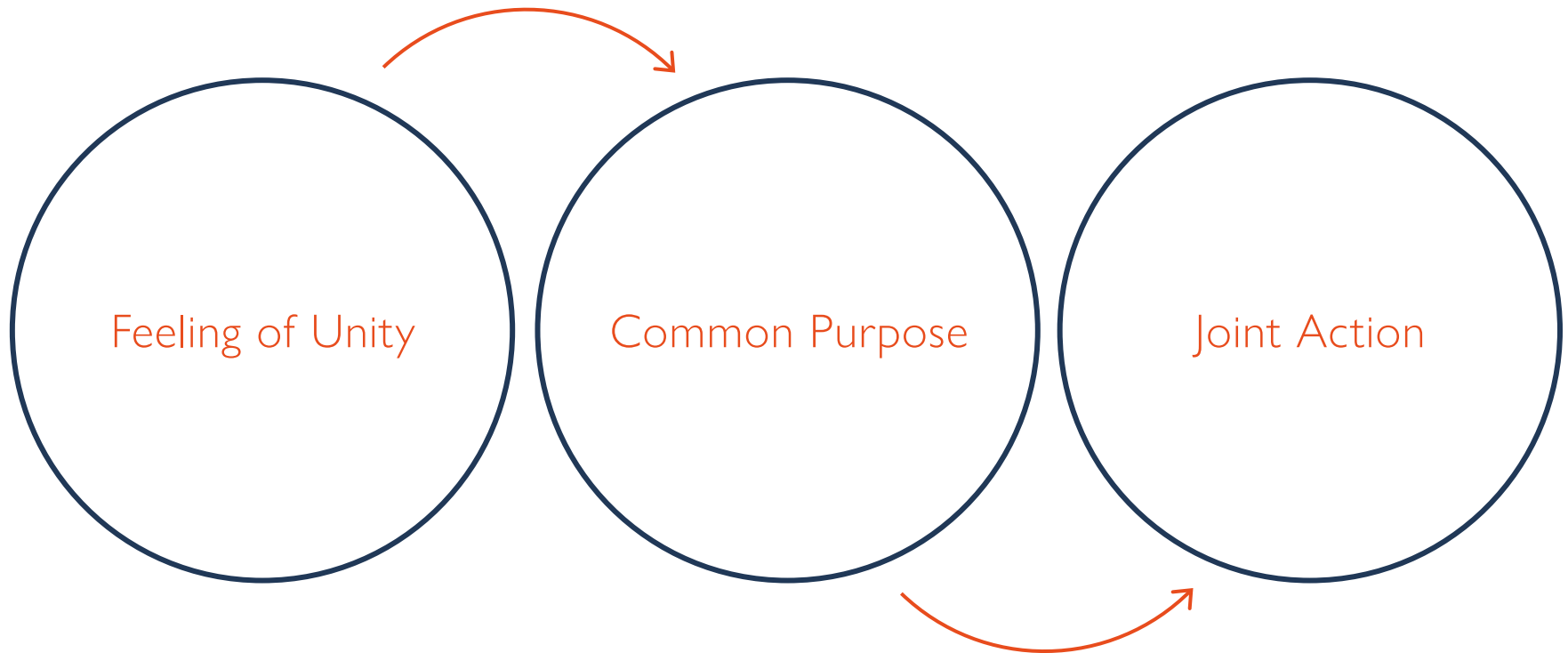




FIGHTING THE FORCES:  
BY NURTURING THE  
CONDITIONS THAT  
BUILD FAMILY COHESION  
AND RESILIENCE



# WHAT IS COHESION?





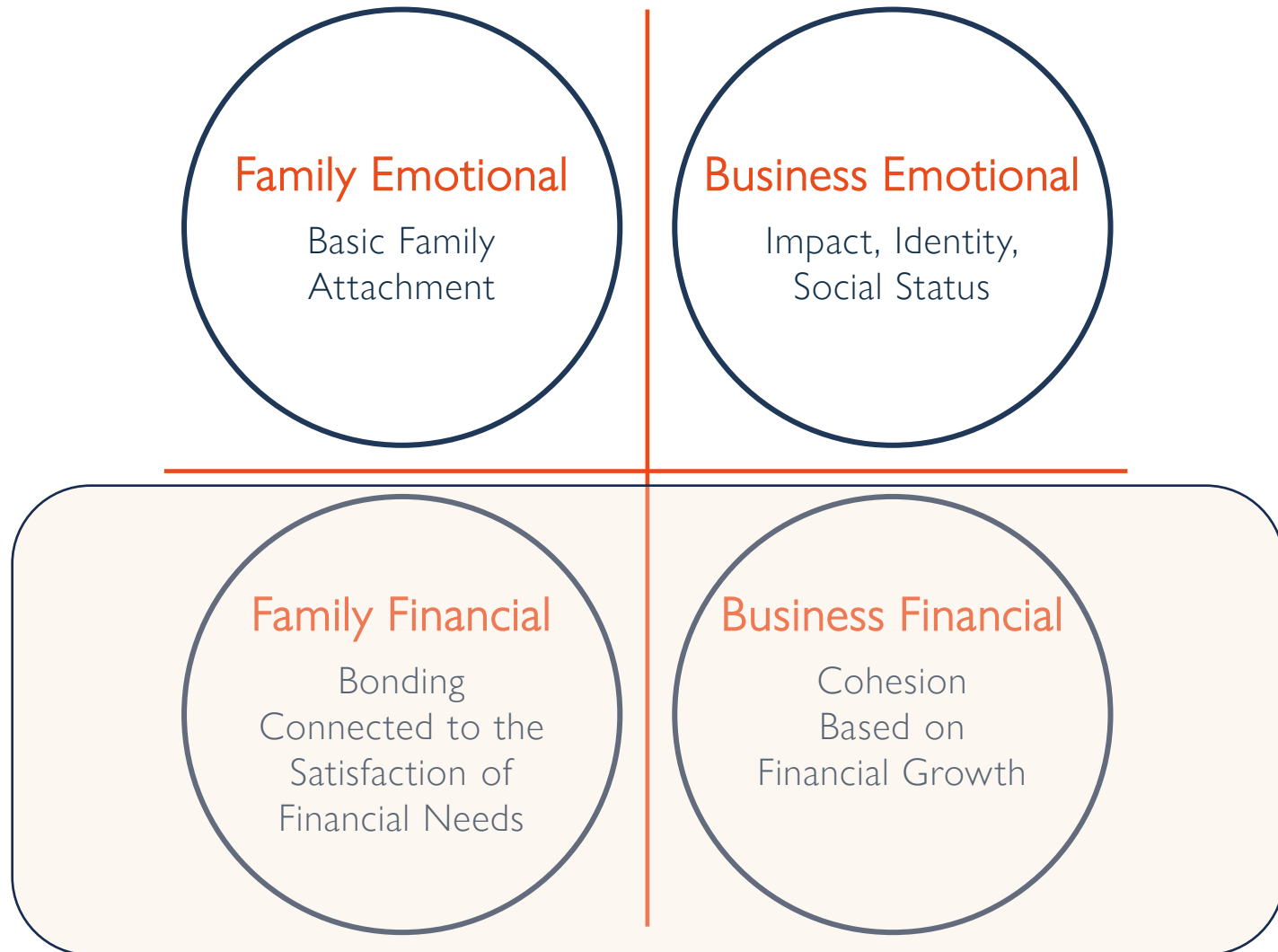
# DIMENSIONS OF COHESION



# The problem

Most family offices are built to meet the stated (financial, legal, and accounting) needs of the family, not what sustains enterprising families for the long term.

# DIMENSIONS OF COHESION



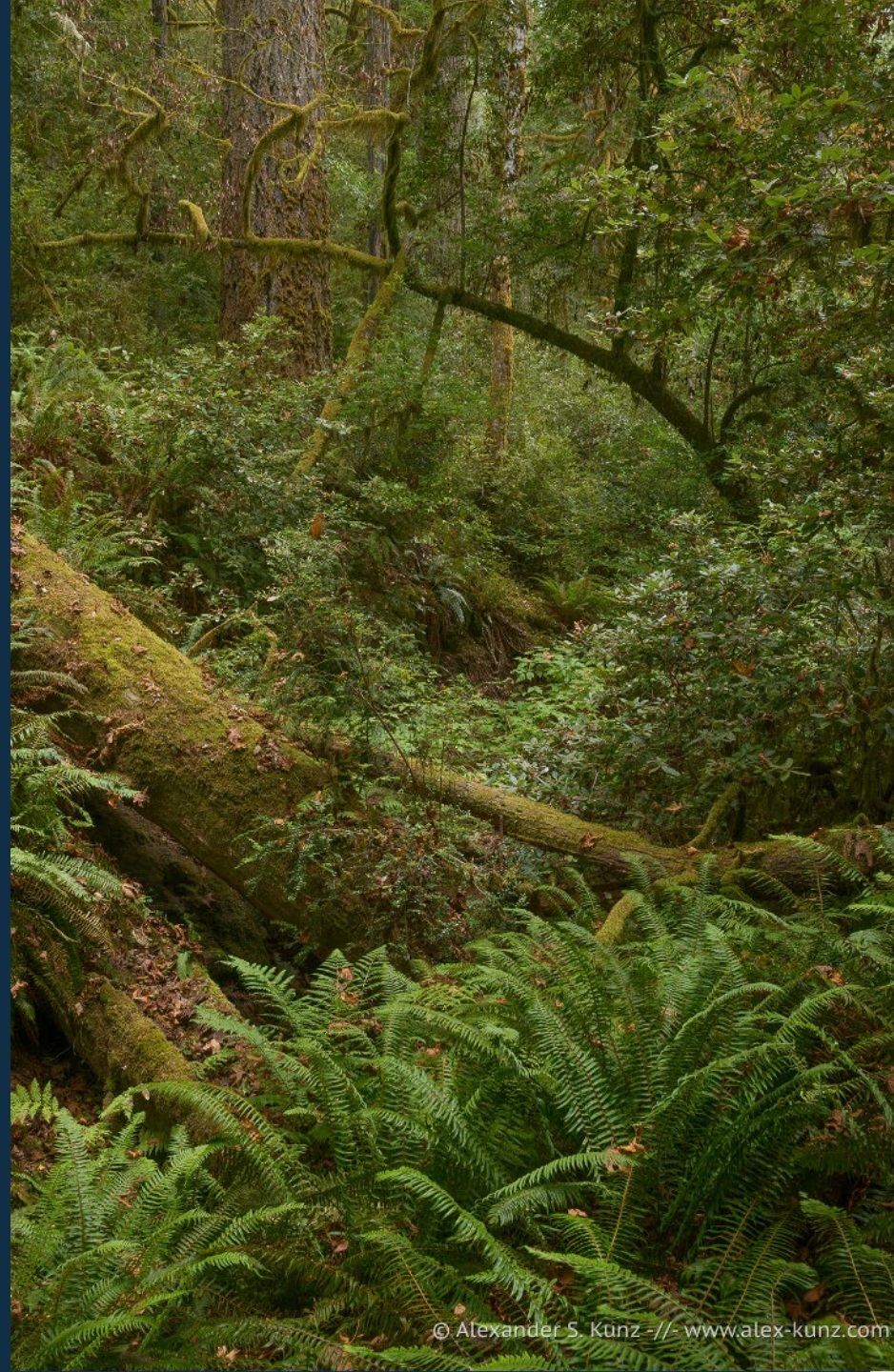
# The problem







**VS.**

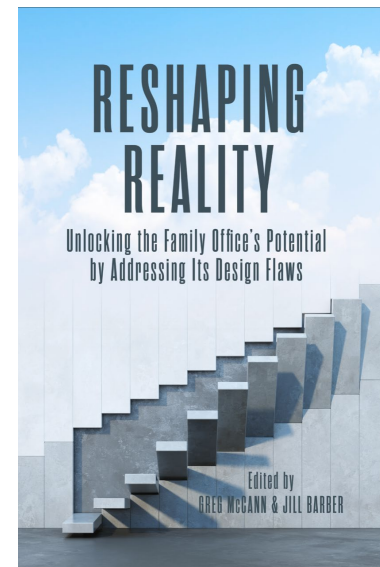
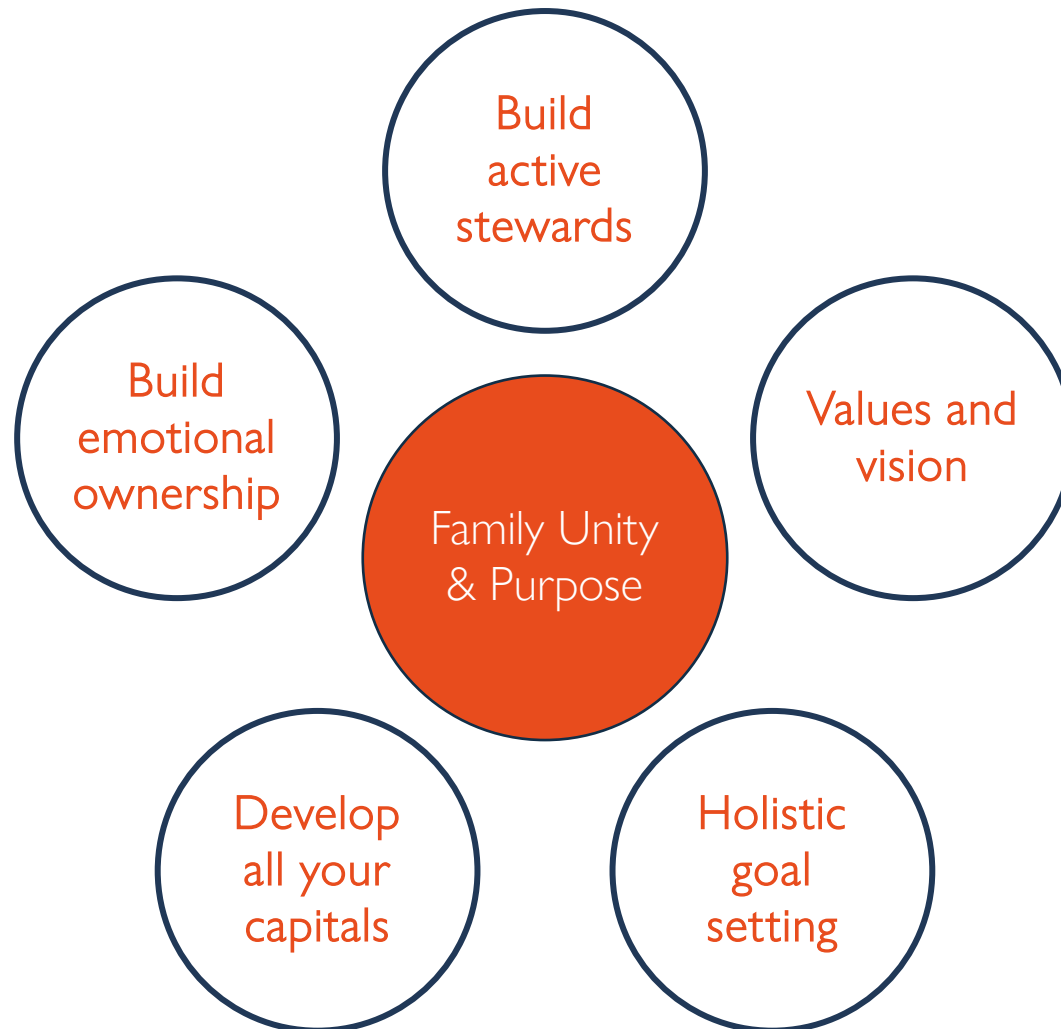




# DIMENSIONS OF COHESION



# THE TRANSFORMATIVE FAMILY OFFICE



# DEVELOPING A SHARED SENSE OF PURPOSE



## Avoid the one-way conversation

- What impact do we want our wealth to have
  - On us as individuals?
  - On our family?
  - On our community?
- What are the values that we share that should guide this intent?
- It's about more than just money: How will we use our resources to develop our diverse capitals
  - Human Capital
  - Intellectual capital
  - Social Capital
  - Spiritual Capital

# LEADERSHIP OF THE FAMILY OFFICE



The leadership team sees family health and cohesion as their key mission.

Examples:

- Chief Cohesion Officer
- Chief Learning Officer
- Family dynamics and cohesion training for all staff
- Regular cohesion audits



# THANK YOU!

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