Family Office Diagnostic and Best Practice Review

BIG CANYON ADVISORS

Reviewing your family office and comparing it to the best practices of family offices around the world, using quantitative and qualitative analysis. Applying a career's worth of experience, interactions with hundreds of single family offices and deep industry knowledge, to advise your office.

Why do a Best Practice Review?

Family offices are very private. While they frequently network with each other, even sharing investment ideas, they usually do not go deep into details. A diagnostic gives you the chance to answer the questions on the right.



- ❑ How does our family office compare to leading family offices?
- ❑ Do we have the right controls and governance in place, and are they effective?
- ❑ Are our operation and technology as effective as they should be?
- ❑ What key risks or gaps have we not considered?
- ❑ Is our office encouraging the family's desired long-term legacy?
- ❑ Are succession, reporting, and communication working well?
- ❑ What should we prioritize next?

5-Step Process:

We have honed our process over many years, reviewing numerous family offices.

1. Gather data

Collect policies, charts, reports, etc.

2. Interview & observe

Speak with staff and advisors, observe processes.

3. Analysis

Evaluate findings against leading practices and identify strengths, risks, and opportunities. Create deliverable.

4. Present findings

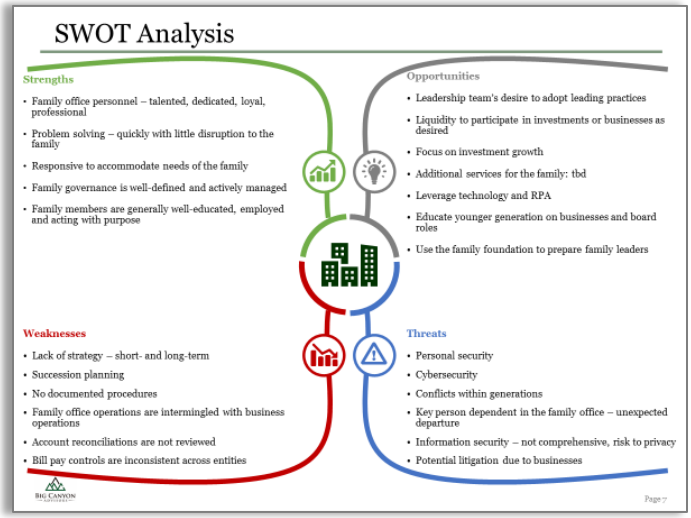
Meet with leaders to share and discuss findings.

5. Prioritize actions

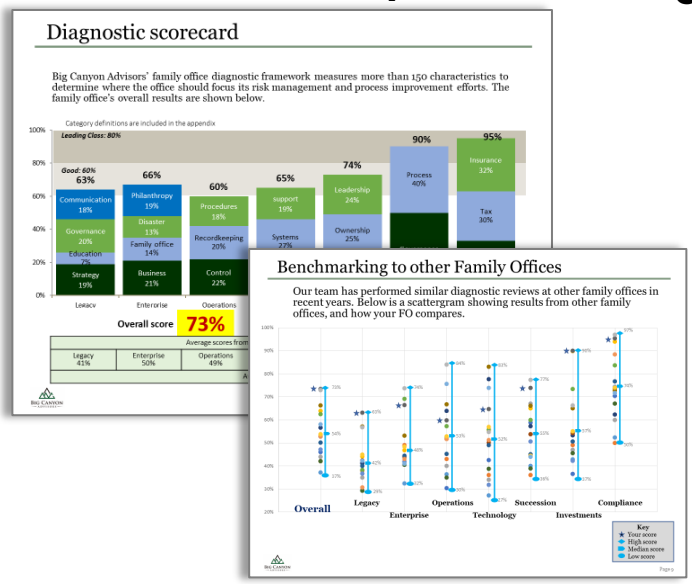
Follow-up meeting with leaders to prioritize the recommendations.

What You Will Receive

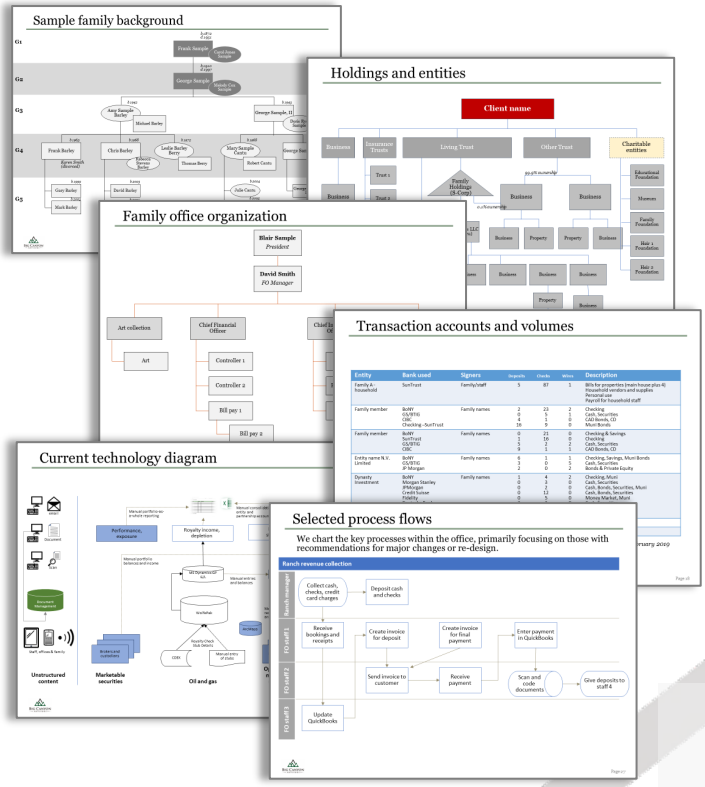
Current-State Assessment



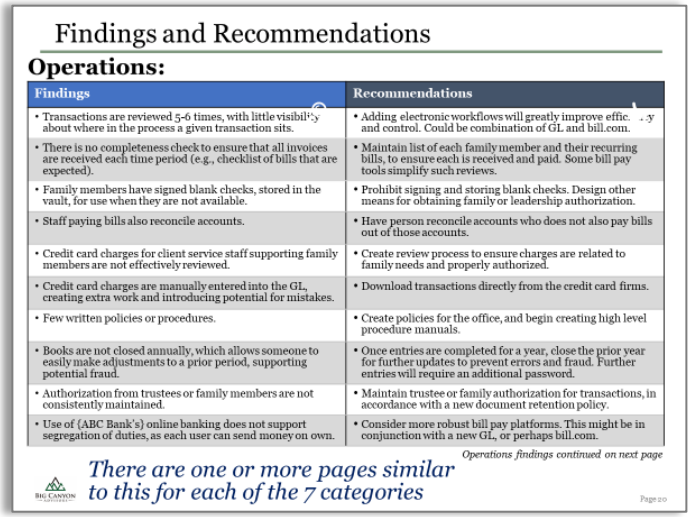
Detailed Scorecard / Benchmarking



Documented current environment



Prioritized Recommendations



Explore our Diagnostic

Scan to learn more about our approach.

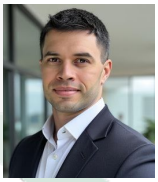
To discuss how we can support your family office, contact:

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