

Winter 2024 Newsletter

Resources for Leading, Learning, and Connecting as a Family Enterprise



Expand Your Thinking and Learn New Strategies: Conference

Family Business Transitions Spring 2024 -
"Navigating Change in the Family and the Business"
April 17 - 19, 2024, Tampa, FL

Relative Solutions is a proud sponsor of the upcoming Family Business Transitions Spring conference on April 17-19, 2024, in Tampa, FL. Attendees will learn how other families deal with their multigenerational challenges in an openly sharing environment and hear from some of the best thought leaders in the family business community to learn new strategies and develop big ideas. Carolyn Greenspon and Rebecca Meyer will lead a breakout session entitled "Why Boosting Your Family Intelligence Quotient (FQ) Enhances Your Family Business."

We would be delighted to see you there. Ask us about a registration discount.

[Learn More](#)

All in the Family

"Inviting In-Laws into the Family Enterprise System"
By Carolyn Greenspon & Bryn Monahan



"Bringing spouses into the family can be an extremely exciting time. It can also come with a lot of questions and can place anxiety on the couple getting married. Being thoughtful about the conversations that need to take place ahead of time can relieve stress for everyone."

In the spirit of the month of love, two of our colleagues, Carolyn Greenspon and Bryn Monahan, offer suggestions for welcoming in-laws.

[Read the Article](#)



How Are Successful Family Offices Thinking and Operating?

Global Family Office Report 2023
Citi

"Have you ever wanted to benchmark your family and/or your family office?"

In January, Rebecca Meyer joined Alexandre Monnier, Global Head of Family Office Advisory, and Ajay Kamath, North America Head of Family Office Advisory, of Citi for a discussion about their recent survey of family offices. The conversation focused on the professionalization of the family office and how it is moving at three different speeds in three areas. The survey found that investment function is the most professionalized, family office activities are in the middle, and the family – in areas like governance, succession planning, and education – is the least formalized. This is not so surprising. It takes a lot of forethought for families to recognize the benefits of organizing themselves for economic sustainability.

You might think about using this survey to benchmark your own family and/or your family office. Have you worked on your family constitution? Do you have an annual retreat? What types of educational efforts have you undertaken with your next generation? Have you thought about leadership succession? These practices are essential elements of family enterprise sustainability, and getting started on any one of them can make a big difference in preparing your family for the next transition.

[Read the Report](#)

Expand Your Thinking and Connect With Peers in Person

SEFOF 2024
September 23-25, 2024, Atlanta, GA.



Save the date for this year's conference: September 23 - 25 in Atlanta, GA.

We know that families find a lot of value in learning from and networking with peers. Our clients have found that the South Eastern Family Office Forum (SEFOF) is an intimate conference for both formal and informal learning that is made BY and FOR family members and executives. Once again, **Relative Solutions** is an Educational Partner for SEFOF 2024 and we are excited for this year's program. Rebecca Meyer, Bryn Monahan, and Jillian Wagenheim look forward to seeing you there.

[Learn More](#)



Relative Solutions guides families who share assets through the difficult questions that emerge from the shared risks and opportunities that impact their lives together. We provide a structured space that is neutral, objective, and conflict-free, so a family's best thinking can emerge to solve their most pressing challenges. Leveraging our proven process, families get the sense that change is possible, and are able to embrace tailored, practical solutions that have a substantive and lasting impact.



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