

Bringing Family to Capital

Intergenerational Wealth Management

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VRIJE
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CENTER FOR
ENTERPRISE
FAMILY RESEARCH



Impact of Enterprise Families



Global Economic
Growth

(White, 2017)

Employment

(Shanker & Astrachan, 1996;
White, 2017; Zahra, 2005)

Philanthropic
Capital

(Boris & Wolpert, 2001)

Start-up
Finance

(Steier, 2001)

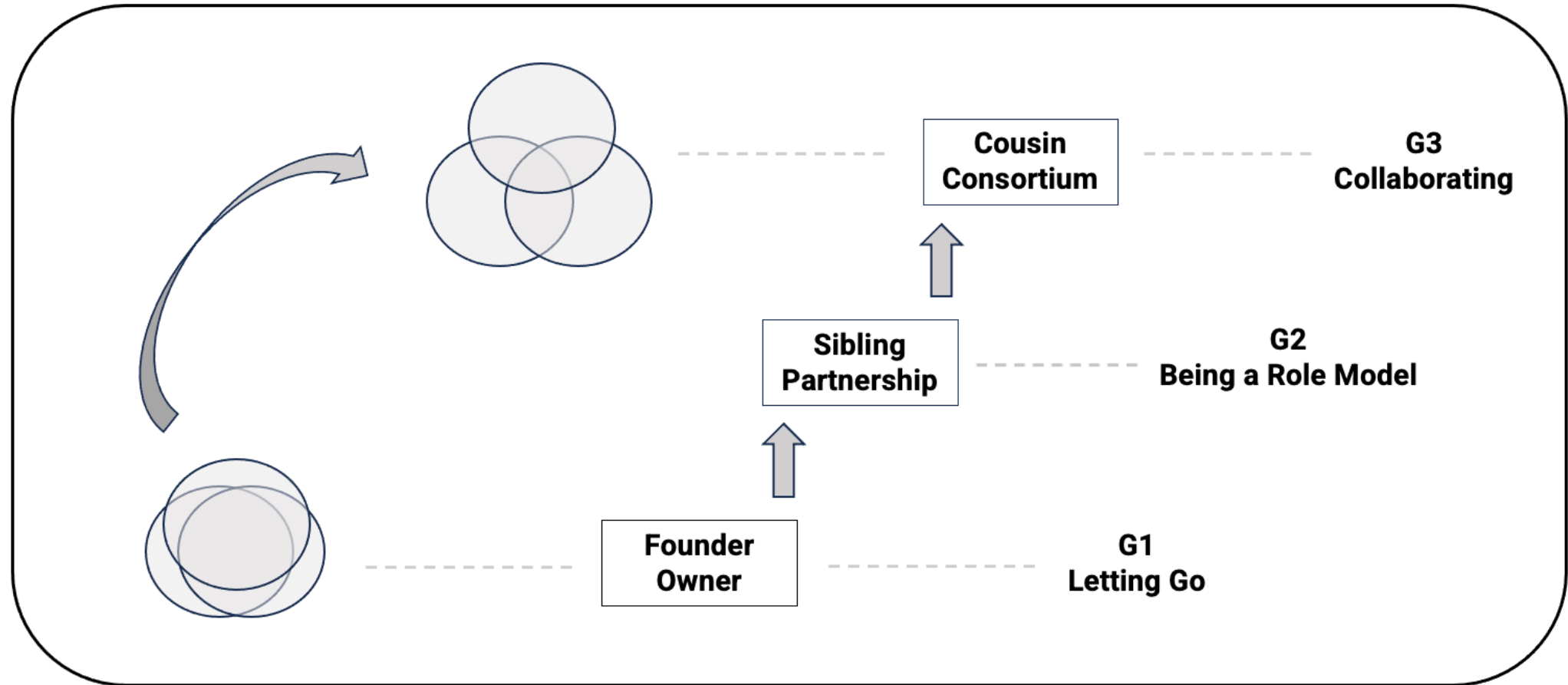
Technological
Innovation

(Zahra, Hayton,
& Salvato, 2004)

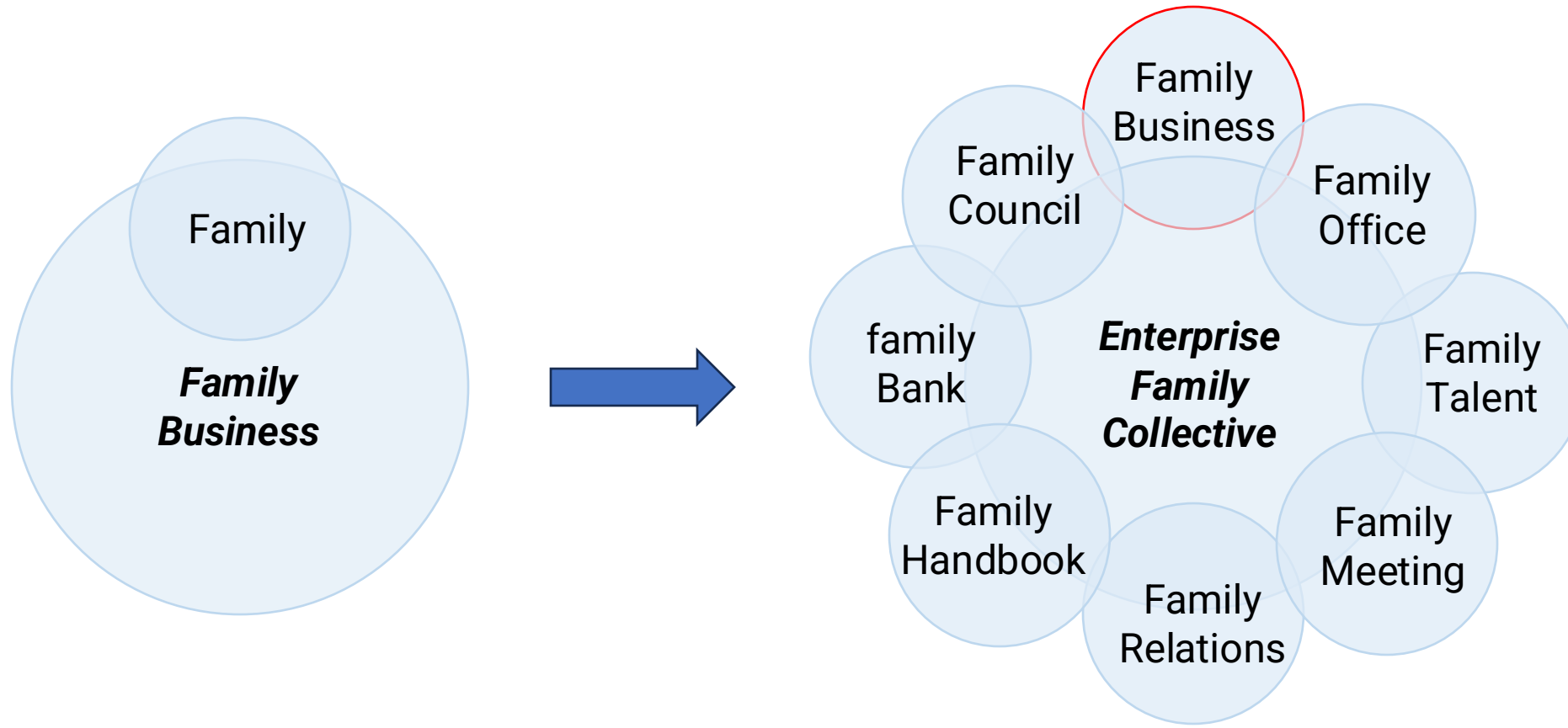
Capital Market
Performance

(Anderson & Reeb, 2003;
Caspar, Dias, & Elstrodt, 2010)

Generational Evolution



Family Enterprise Evolution



(adapted from John Davis, 2013)

Family Business Ownership

BUSINESS LENSE

- Value of the shares
- Dividend Payouts
- Liquidity Fund

FAMILY LENSE

- Family Legacy, Sense of Belonging
- Company Reputation
- Shareholder Education, Learning Opportunities, Life Experiences
- Networking, Social Access

RESULTS

EMOTIONS

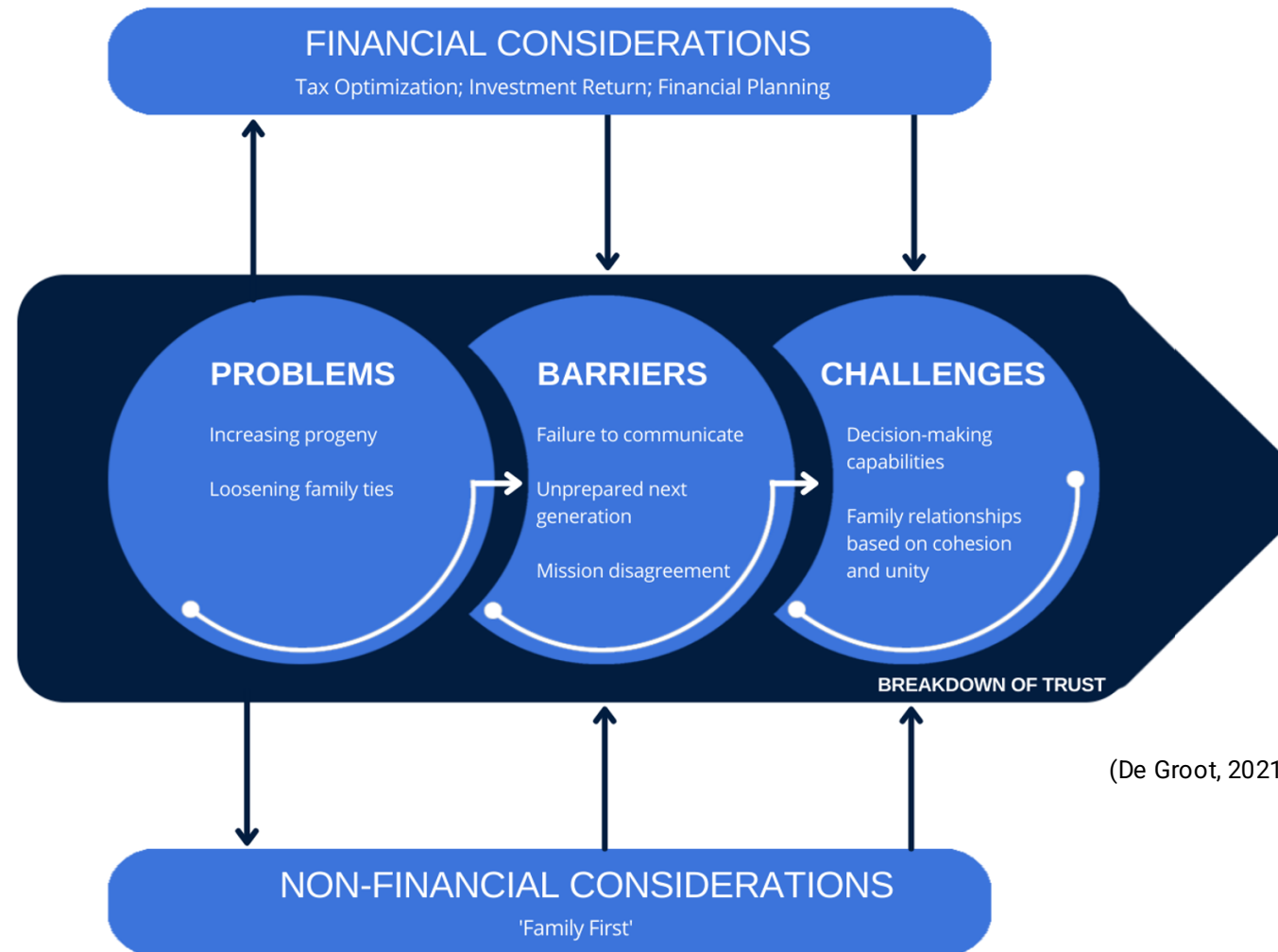
Attributes



Challenges

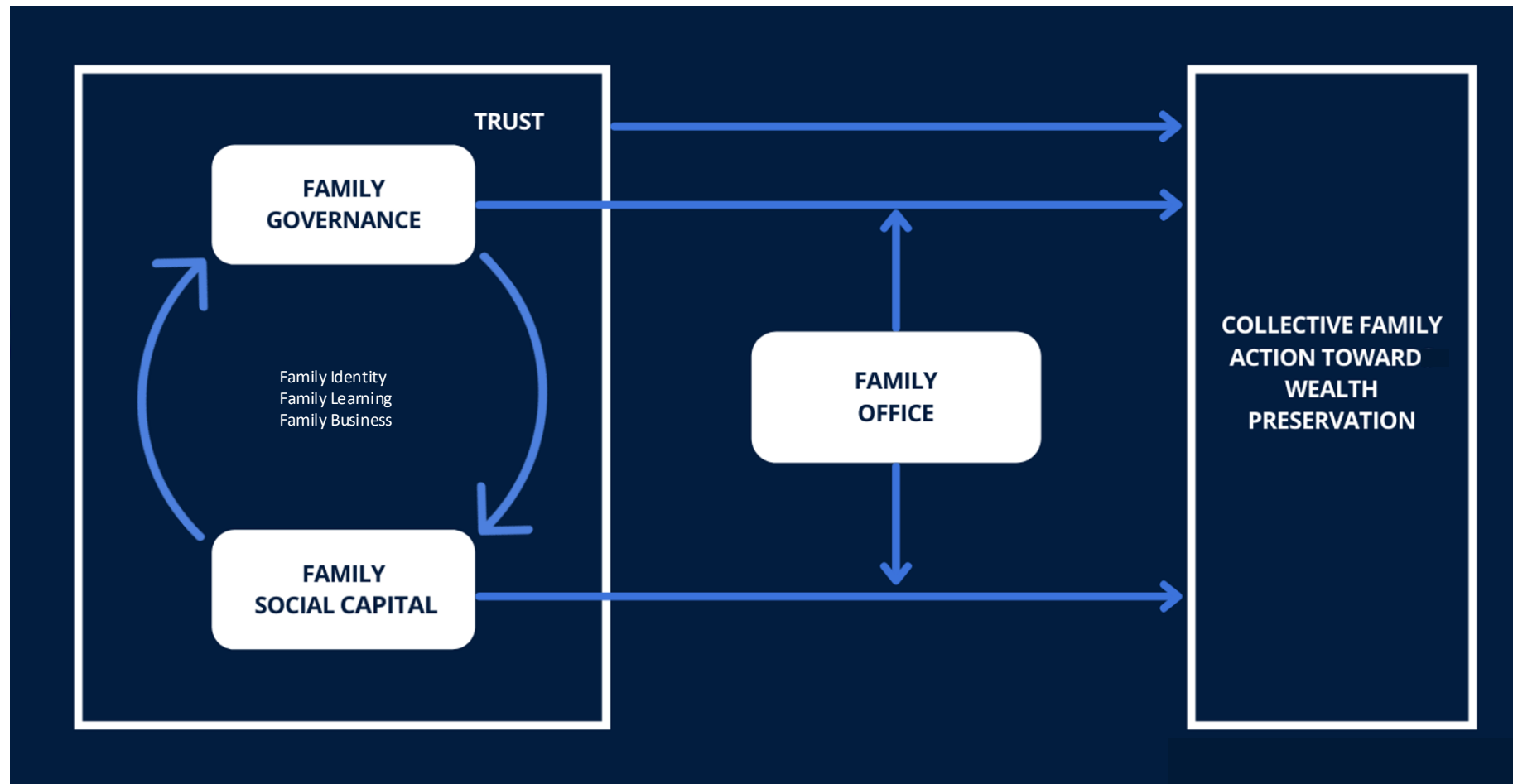


Root Causes of Wealth Preservation Failure



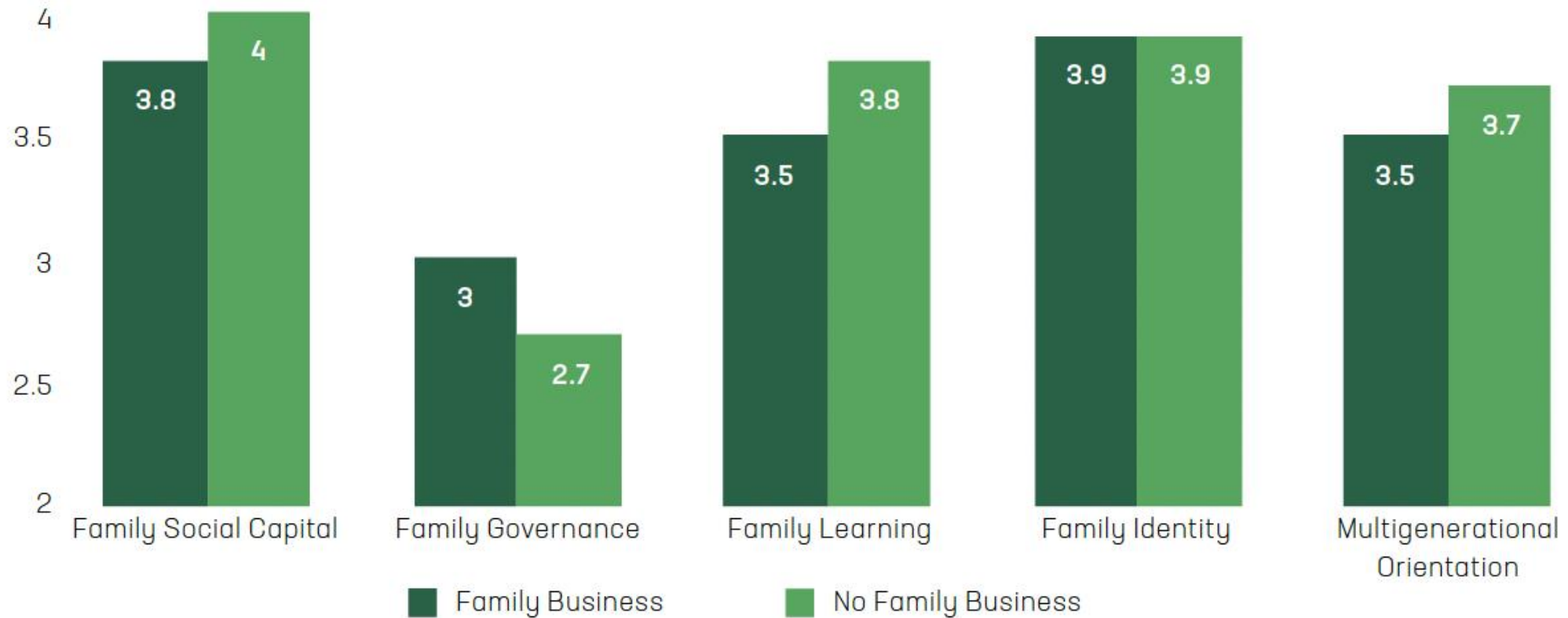
(De Groot, 2021)

Model of Wealth Preservation Success

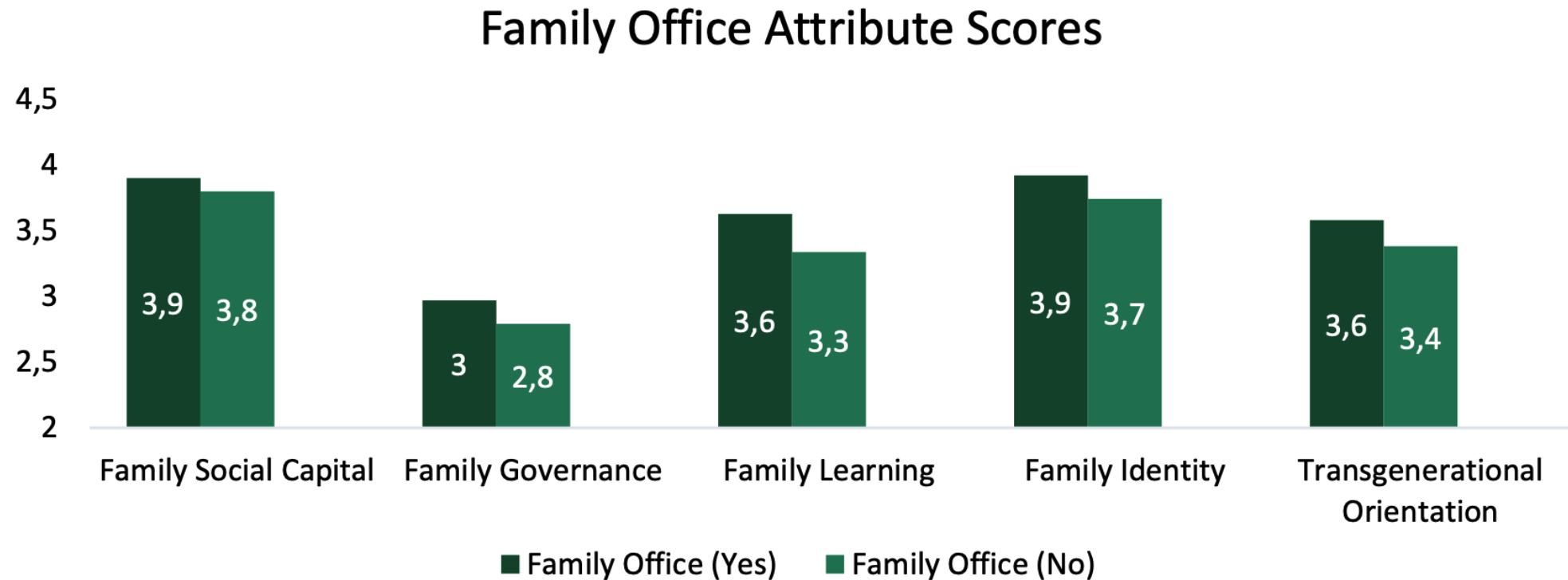


(De Groot, 2021)

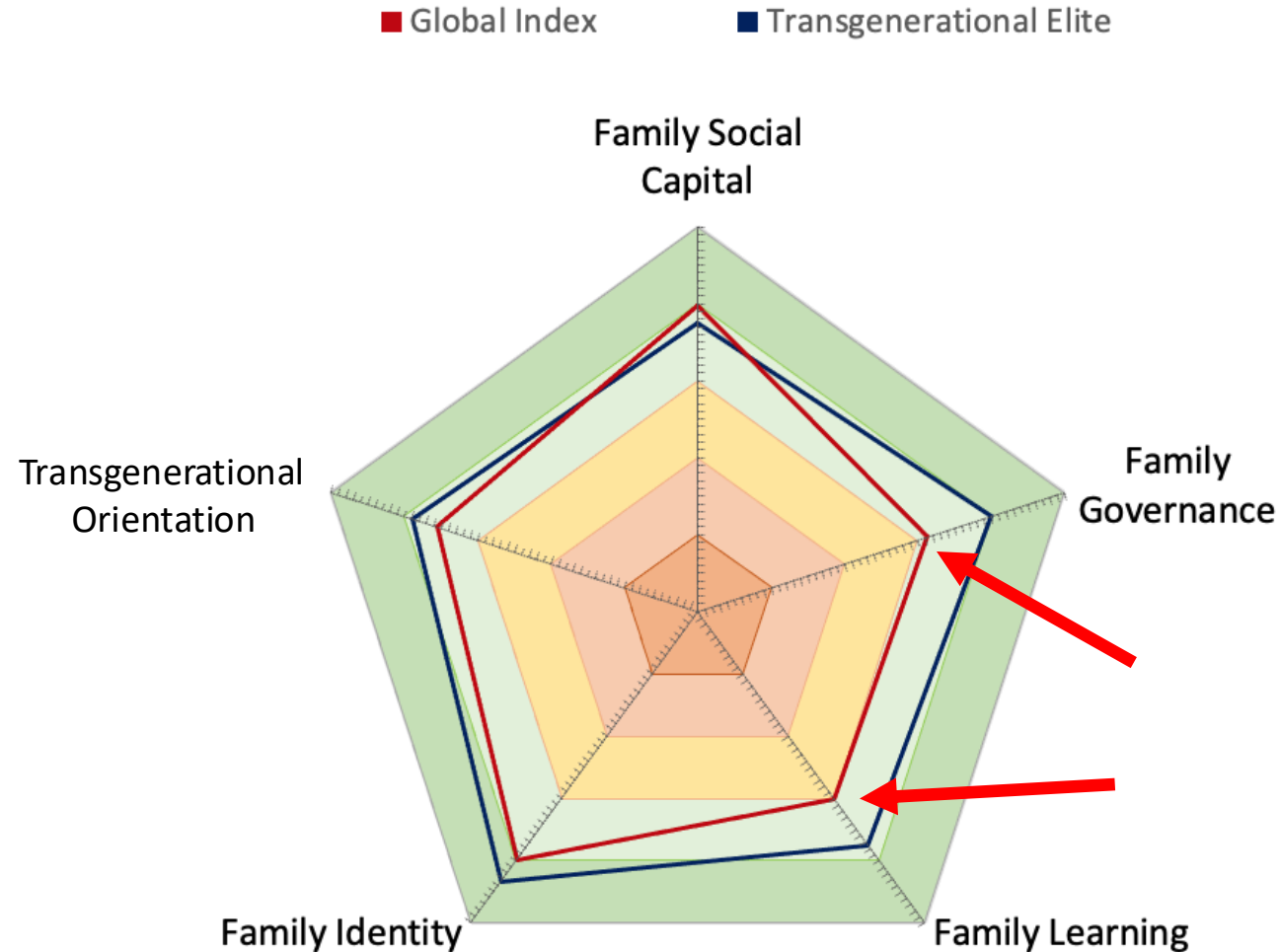
Enterprise Families with Family Businesses score *Lower* than those without.



Enterprise Families with Family Offices score *Higher* than those without.



Global Index - Transgenerational Elite



Privilege Paradox

Wealthy parents
unknowingly put their
children in a dilemma.

Dallington



Next Gen an Opportunity, but also Threat





Enterprise family mindset, ownership,
strategy, capital, governance, dynamics, and roles

- ✓ Three 5 days modules over a nine-month period;
- ✓ Aged 25 - 40 years, family members only;
- ✓ World class knowledge, skills and connections;
- ✓ Cases, classes, projects, assessments, mentoring;
- ✓ Certificate VU Amsterdam university

RESPONSIBLE OWNERSHIP *for* ENTERPRISE FAMILIES



GAIN USEFUL INSIGHTS

Learn practical knowledge from the brightest minds and most successful family enterprises on enterprise family fundamentals, challenges, solutions, and opportunities.



DEVELOP YOUR EXPERTISE

Develop key skills to become a responsible owner, ensuring a sustainable future and long-term positive impact.



EXPAND YOUR NETWORK

Interact with enterprise family leaders and experts from around the world and develop and engage with a renowned faculty and a global network of peers.

To learn more visit www.ROEF-Academy.com

Main Point to Remember

Wealth Preservation is
Not about Money

