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WE STANDS FOR

WEALTH ENTERPRISE

Successful businesses operate with detailed succession plans, governance structures, complete financial statements and active leadership to strategically manage the company day to day, year after year. Why should a wealthy family operate differently?

[☞ TALK WITH AN ADVISOR TODAY](#)

Meet WE
ABOUT US

Our Services
WHAT WE DO

Team
MEET OUR TEAM

FAQs
FREQUENTLY ASKED
QUESTIONS

Do You Need a Family Office?

FAMILY OFFICES

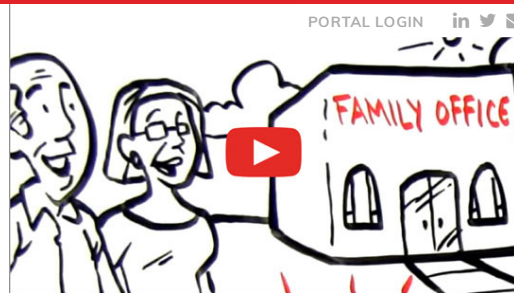
Over our decades of working with some of the world's wealthiest families, we've observed the families who successfully sustain their wealth across multiple generations – that is, enjoy, grow and ensure it benefits family members – manage the family wealth as they would a business enterprise. They create a wealth enterprise.

Our work can be broken down in three main aspects of your financial life:

[WEALTH OWNERSHIP & PURPOSE](#)

[WEALTH RESOURCES & STRUCTURES](#)

[WEALTH MANAGEMENT](#)



[WATCH "A FAMILY OFFICE IS A BETTER WAY"](#)



[WATCH "WE STANDS FOR WEALTH ENTERPRISE"](#)



[WATCH "ROLE TRANSITION: ARE YOU READY TO TAKE THE LEAD?"](#)

Role Transition: Are You Ready to Take the Lead?

In our work with wealthy families, we often find a natural division of labor in which the husband manages the family's wealth enterprise, making most of the major financial decisions for the family.

In many cases, this division of labor works well...until the primary decision-maker is unable to manage the financial affairs of the family.

Read our latest commentary to learn more about how women who have taken a passive role in the family's finances can prepare to become a confident CEO of the family's wealth enterprise.

[READ THE FULL PIECE HERE](#)

Thought Leadership

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Industry Recognition & Highlights

WE Family Offices is proud to have received recognition from industry publications and organizations. Though our focus is always first and foremost on our clients, we feel this recognition

Read our ADV

WE Family Offices is registered as an Investment Advisor with the U.S. Securities and Exchange Commission. We are committed to being clear and

WE Family Offices Is Now a B Corp

Since the founding of our firm, our focus has been to support successful families and help them sustain both their financial and their human capital, helping them be successful for the

points to our commitment to client service and putting our client families first.

[FAMILY OFFICES AWARDS & HIGHLIGHTS](#)

WE

open about how we work with families, our unique business model, and our compensation structure.

[READ OUR ADV](#)

benefit of themselves, their families, their communities, and the world at large. To underscore this mission, we've recently been certified as a B-Corp.

PORTAL LOGIN



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