NEW YORK INSTITUTE OF FINANCE
ESTABLISHED 1922

Where Wall Street Goes to School

Global Family Office Program

Flagship offering **Global Family Office Professional Certificate**

Master family office strategy — from **direct investments** and **digital assets** to **governance** and **generational succession**.

NEW YORK INSTITUTE OF FINANCE

1 Week Program - In Person (NY campus)or Virtual (Live)

www.nyif.com

↑ GROWTH OF FAMILY OFFICES

~11,000

family offices projected worldwide by 2030

↓ THE CAPABILITY GAP

86%

of family offices lack formal succession plans

Family offices are one of the fastest-growing segments of global wealth management.

Yet many professionals enter these roles without formal training in:

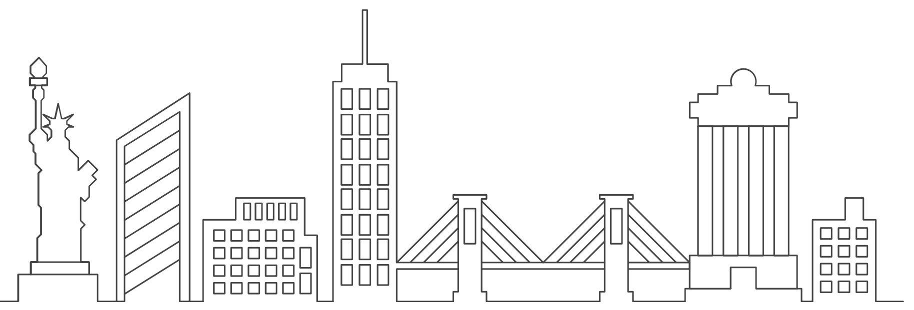
- Governance frameworks
- Direct investment strategy
- Multi-generational succession planning

About the Program

NYIF's **Global Family Office Program** is a comprehensive executive education, certification, and professional community platform designed for family office executives, founders, next-generation wealth holders, and trusted advisors serving ultra-high-net-worth families.

Flagship Certification

The program's flagship offering, the **Global Family Office Professional Certificate**, provides practical, practitioner-led education on family office structure, governance, investment oversight, risk management, succession planning, and the evolving responsibilities of modern family office leadership.



THE GFO DESIGNATION

Programme Overview

1 Week · In-Person (NYC) or Virtual (Live)

Participants explore the full ecosystem of family office management, including investment strategy, governance, operations, and generational planning.

THIS PROGRAMME COVERS

- Global Capital Markets
- Portfolio Management
- Real Estate Investments
- Venture Capital and Direct Investment
- Family Office Operations
- Digital Assets and Cryptocurrency
- Family Governance
- Art Investment
- Specialized Borrowing and Lending
- Family Philanthropic Management

AUDIENCE

Who Should Attend

This programme is designed for professionals and family members at any stage who manage, advise, or oversee family wealth structures.

Family Office Professionals

CIOs, investment directors, operations leaders, trust officers

Professionals working in single or multi-family offices who want structured expertise across investments, governance, and operations.

Financial Professionals

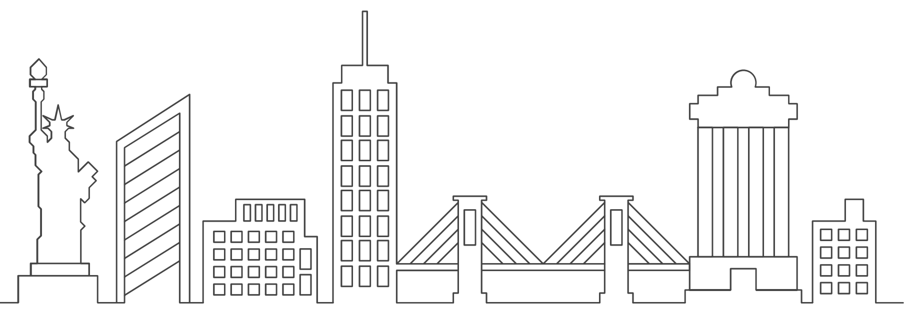
Wealth managers, private bankers, RIAs, financial advisors

Expanding into family office advisory — one of the fastest-growing segments in wealth management.

High-Net-Worth Family Members

Principals, next-generation leaders, family council members

Overseeing family wealth — from investment strategy to succession planning.



10 CORE MODULES

Curriculum

LEARNING MODULES

MODULE 1

Global Capital Markets

Understand global capital markets from a family office perspective, with a focus on asset allocation, risk, and long-term wealth preservation.

- Global Equity Markets
- Global Fixed Income
- Commodity Markets
- Forex Markets
- Risk Management: Understanding Derivatives

MODULE 2

Portfolio Management

Learn how to construct, manage, and optimize investment portfolios across asset classes.

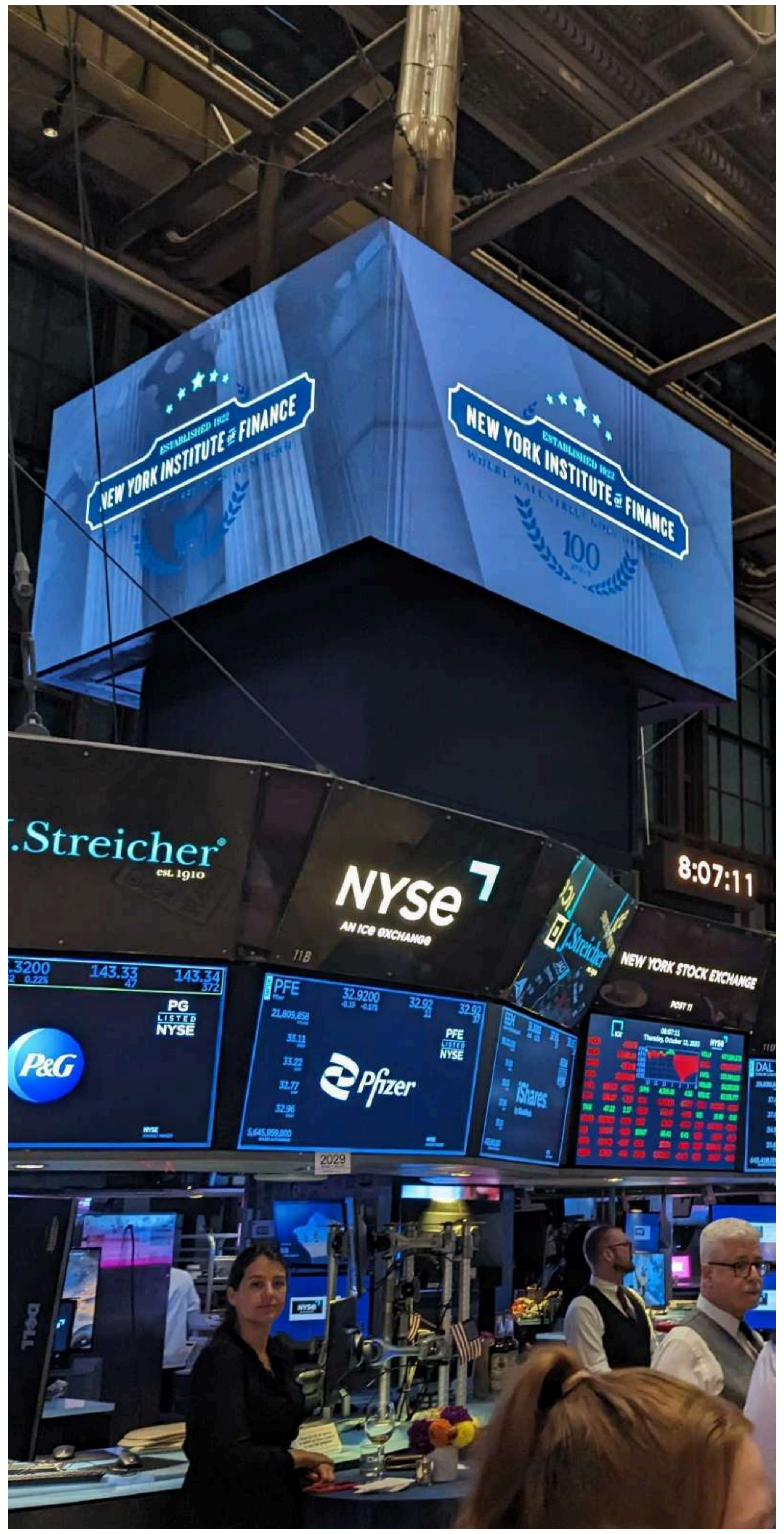
- Fixed Income and Money Markets
- Equity Risks and Return
- Private Equity and Venture Capital
- Hedge Funds
- Indexing vs. Active Management

MODULE 3

Real Estate Investments

Assess real estate as a core family office asset, including investment structures, financing, and risk.

- Global Real Estate Market Overview
- Real Estate Project Finance
- Real Estate Asset Classes
- Real Estate Investment Trusts (REITs)
- Real Estate: Fund or Direct Investment?
- Tax Considerations



Curriculum Continued...

10 CORE MODULES

...Curriculum (Continued)

LEARNING MODULES

MODULE 4

Venture Capital and Direct Investment

Understand how family offices source, evaluate, and structure direct investments.

- VC/PE Trends
- Screening and Valuing Candidates
- Fund vs Direct Investing
- Financing the Investments

MODULE 5

Family Office Operations

Build the operational infrastructure required to run a modern family office.

- Reporting and Record Keeping
- Risk Management and Insurance
- Screening Financial Requests from the Family's Network
- Managing Reputational Risk
- Inheritance and Estate Planning

★ SPECIALIZED MODULE

MODULE 6

Digital Assets and Cryptocurrency

Navigate the digital asset landscape and evaluate crypto allocation strategies for family portfolios.

- Fundamentals and History of Cryptocurrency
- Understanding Crypto Volatility
- Understanding Blockchain
- Decentralized Finance (DeFi)
- Direct or Fund Investing?

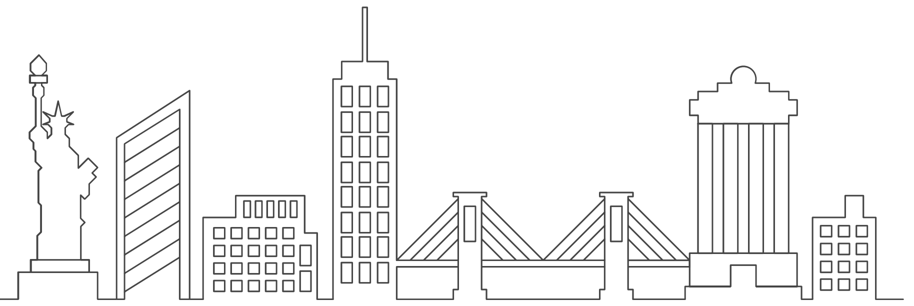
MODULE 7

Family Governance

Establish governance frameworks that align family interests and reduce conflict.

- Creating a Decision Making Process
- Inter and Intra Generational Communication
- Reviewing the Family Office's Performance
- Creating a Mission Statement and Investment Policy Statement

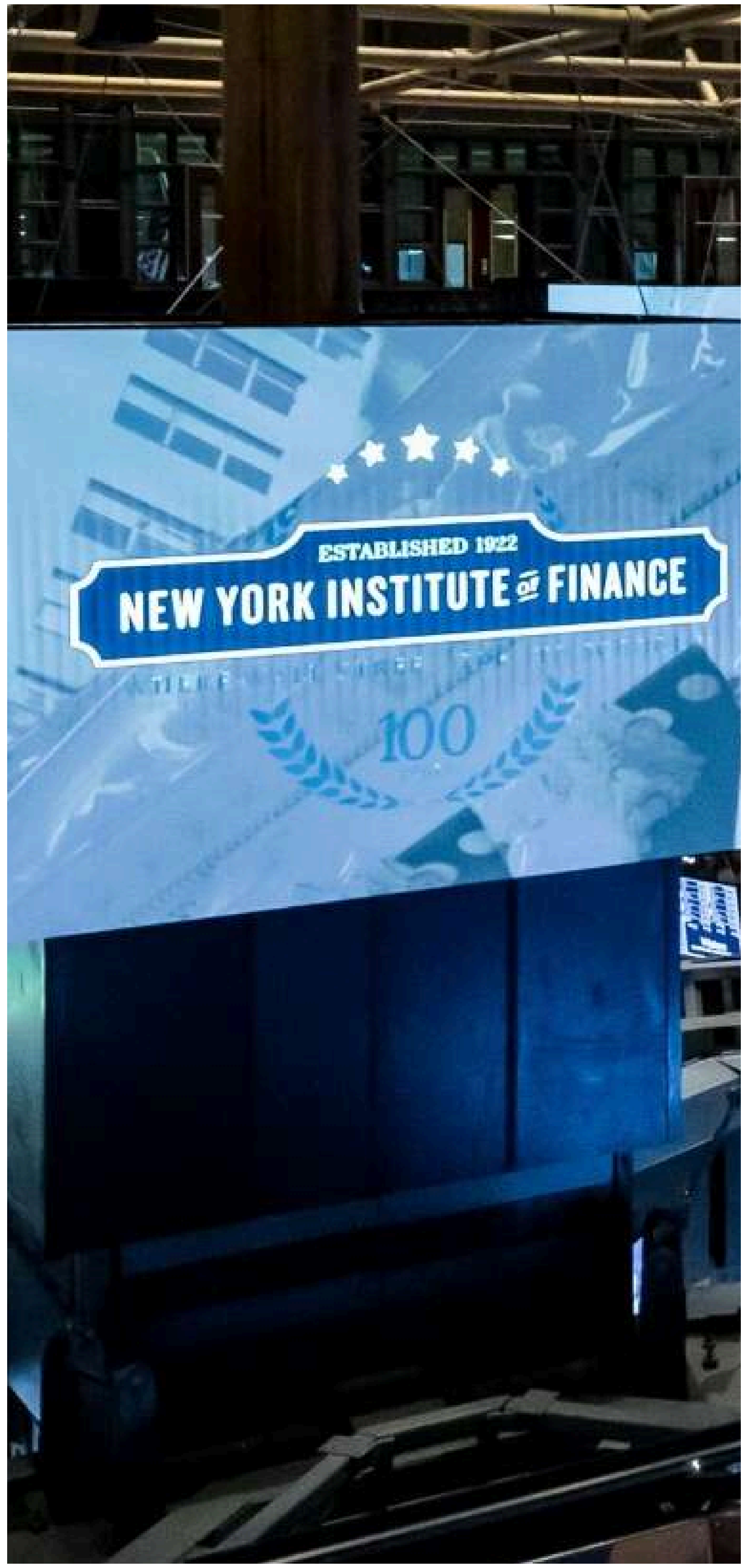
Curriculum Continued...



10 CORE MODULES

...Curriculum (Continued)

LEARNING MODULES



★ SPECIALIZED MODULE

MODULE 8

Art Investment

Navigate the global art market as both an asset class and a family legacy strategy.

- Overview of Global Art Market
- Investing Risks: Forgery and Stolen Art
- Borrowing Against Art
- Risk Mitigation and Recovery Strategies

MODULE 9

Specialized Borrowing and Lending

Examine how family offices use structured borrowing and lending strategies to enhance liquidity, leverage assets, and manage risk.

- Introduction to ESG and Responsible Investing
- Measuring Social and Environmental Impact
- Green Bonds and Climate Finance Instruments
- Building a Sustainable Family Portfolio

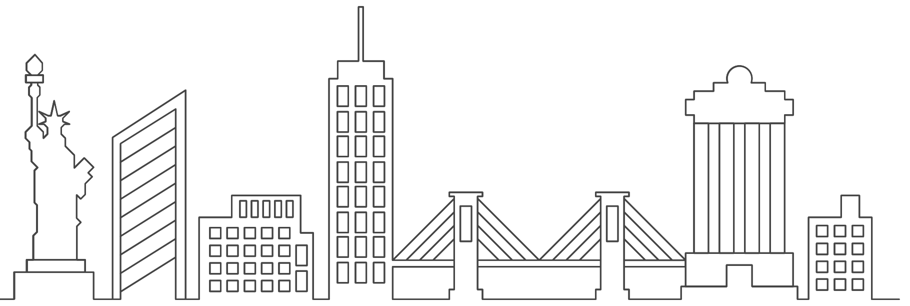
★ SPECIALIZED MODULE

MODULE 10

Family Philanthropic Management

Design and manage philanthropic strategies that reflect family values and maximize impact.

- Philanthropic Planning and Strategy
- Establishment and Administration of Charitable Institutions
- Planning a Donation Strategy
- Formation of Grant-making Foundations and Trusts
- Organizing Charitable Activities
- Sustainable Finance and Impact Investments



Faculty and Bespoke Programs

Faculty

- The faculty has been carefully curated to bring together **senior practitioners, advisors, and subject-matter experts** across the core disciplines involved in **family office leadership and management**.
- Each faculty member is selected for specialized expertise in **governance, investment strategy, risk management, estate and tax planning, alternative investments, philanthropy, operations, succession planning, and advisory services**.
- **Faculty participation may vary** by program session, location, subject area, or delivery format.

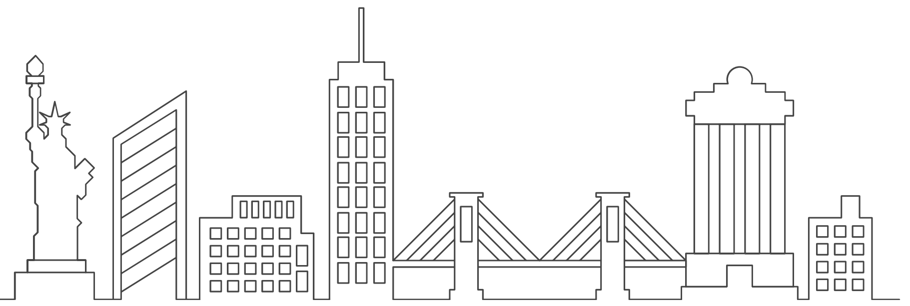
Bespoke Family Office Education | Custom Programs

- Beyond the flagship **Global Family Office Certification**, NYIF offers **bespoke family office education programs** for families, family offices, private banks, advisory firms, and institutions seeking **tailored learning experiences**.
- Areas of focus may include **family office formation, governance, investment oversight, risk management, succession planning, philanthropy, operations, next-generation preparation, and advisor education.**
- Programs may be delivered through **private workshops, executive briefings, customized learning modules, family education sessions, or institution-specific training engagements**.

Chris Thomas

Executive Director, Curriculum Architect, and Faculty Member NYIF Global Family Office Program

The program is led by Chris Thomas. Drawing on decades of experience across investment banking, commercial banking, risk management, alternative investments, hedge funds, and family office advisory, Chris oversees the program's strategic development and serves as the architect of its educational framework and curriculum.



Community and Continuing Engagement

Graduates of the certification course become part of the NYIF Global Family Office Community — an ongoing platform for continued learning, professional connection, and engagement with faculty, peers, family office professionals, and trusted advisors — with opportunities to participate in

- Alumni Events
- Executive Roundtables
- Guest Lectures
- Advanced Educational Programs
- Topical Webinars
- Regional Forums
- Curated Networking

Learn More

To learn more about the NYIF Global Family Office Program, the Global Family Office Certification, bespoke education programs, or upcoming events, please contact:

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Inquire Today