QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1546

Family Office & Wealth Management Training Course

WEALTH MANAGEMENT & PRIVATE BANKING
FINANCE, INVESTMENT & BANKING

DURATION **5 Days**	DELIVERY **Classroom**
LOCATION **Makkah, Kingdom of Saudi Arabia**	DATES **21 – 25 Dec 2026**

Scheduled Event Details

CITY	Makkah, Kingdom of Saudi Arabia
DATE	21 – 25 Dec 2026
DELIVERY TYPE	Classroom
COURSE FEE	€4,200

Course Overview

The Family Office & Wealth Management Training Course provides a comprehensive and practical framework for understanding the structure, governance, investment management, and operational requirements of family offices and sophisticated wealth management environments. The course focuses on developing integrated approaches to family wealth preservation, investment strategy, portfolio management, risk management, liquidity planning, governance, and intergenerational wealth transfer.

Effective family wealth management extends beyond traditional investment management. It requires a coordinated approach to financial assets, alternative investments, family objectives, governance structures, risk exposure, liquidity requirements, professional advisers, and long-term succession considerations. This course equips participants with the knowledge and practical frameworks required to connect these areas and support more disciplined and informed family wealth decisions.

The course examines different family office models, including single-family and multi-family structures, together with their governance arrangements, operating models, responsibilities, service providers, investment oversight, and decision-making processes. Participants will explore how family offices can establish appropriate policies and controls while maintaining alignment between family objectives and long-term wealth strategies.

Participants will also examine strategic asset allocation, portfolio diversification, alternative investments, liquidity management, investment manager selection, performance evaluation, risk management, family governance, succession planning, and intergenerational wealth transfer. Practical case studies and workshops enable participants to apply these concepts to realistic family office scenarios and develop structured solutions for complex wealth management requirements.

By integrating investment management, family governance, operational oversight, risk management, and long-term wealth planning, the Family Office & Wealth Management Training Course supports professionals in developing a more structured approach to managing substantial family wealth. It also helps organizations and advisers strengthen decision-making, oversight, reporting, and coordination across the different areas involved in family wealth management.

Objectives

- Analyze the fundamental principles and functions of family offices and relate them to family wealth objectives within the course framework.
- Evaluate different family office models and determine their suitability based on the scale, complexity, structure, and requirements of family wealth.
- Develop an integrated family wealth management framework covering investments, governance, risk management, liquidity, and long-term planning.
- Design clear governance structures defining roles, responsibilities, decision-making authority, and reporting arrangements within a family office.
- Apply strategic asset allocation and portfolio diversification principles to family investment portfolios based on objectives, risk tolerance, and investment horizon.
- Evaluate traditional and alternative asset classes and determine their potential role within a diversified family wealth strategy.
- Develop practical approaches for managing liquidity, financial commitments, cash requirements, and long-term capital needs.
- Assess investment, operational, regulatory, concentration, reputational, and governance risks associated with family wealth management.
- Apply family governance principles to improve communication, decision-making, accountability, and coordination among family members and professional advisers.
- Develop structured approaches to intergenerational wealth transfer and continuity of family wealth management.
- Evaluate investment managers, advisers, and external service providers using appropriate performance, risk, governance, and service criteria.
- Prepare an integrated family office management plan covering governance, investments, risk management, liquidity, succession, and performance oversight.

Who Should Attend

The Family Office & Wealth Management Training Course is designed for professionals working in wealth management, private banking, asset management, investment management, financial advisory, and family office environments. It is particularly relevant for Family Office Managers, Wealth Managers, Investment Managers, Portfolio Managers, Financial Advisers, Investment Advisers, Asset Management Professionals, Risk Managers, Governance Specialists, and professionals responsible for overseeing substantial family assets.

The course is also suitable for family members involved in wealth management and financial decision-making, members of family business boards, executives responsible for family assets, investment professionals working within family-owned structures, and professional advisers supporting family offices. This includes financial advisers, accountants, lawyers, investment consultants, and other professional service providers who work with families with significant and complex wealth, within the boundaries of their professional responsibilities.

Senior executives, private banking leaders, asset management executives, investment professionals, and institutional decision makers can also benefit from the course by developing a broader understanding of family office operating models, investment governance, wealth preservation, portfolio oversight, risk management, family governance, and intergenerational wealth planning.

Learning Outcomes

- Explain the purpose, structure, and core functions of family offices within the broader wealth management environment.
- Distinguish between different family office models and evaluate the characteristics and requirements of each structure.
- Analyze family financial, investment, governance, and operational requirements and establish appropriate wealth management priorities.
- Develop a structured governance framework covering roles, responsibilities, decision-making processes, committees, and reporting.
- Prepare an investment policy framework aligned with family objectives, investment horizon, liquidity requirements, and risk tolerance.
- Develop asset allocation and diversification strategies for multi-asset family investment portfolios.

- Evaluate the potential role of traditional and alternative investments within a family wealth portfolio.
- Apply practical approaches to liquidity management, financial commitments, and long-term capital planning.
- Identify key investment, operational, regulatory, concentration, reputational, and governance risks and develop appropriate controls.
- Evaluate investment managers, advisers, and external service providers using structured assessment criteria.
- Develop an intergenerational wealth transfer and continuity framework that supports long-term family wealth management.
- Prepare an integrated family office strategy covering governance, investments, risk management, liquidity, succession, service providers, and performance monitoring.

Course Outline

DAY 01

Family Office Structures and Foundations of Family Wealth Management

- Definition, purpose, and strategic role of family offices
- Evolution of family office models and wealth management structures
- Single-family offices and multi-family offices
- Assessing family objectives, financial requirements, and wealth complexity
- Family wealth management frameworks and operating principles
- Roles and responsibilities within a professional family office
- Managing relationships with banks, investment managers, advisers, and service providers
- Establishing appropriate reporting and decision-making structures
- Building an integrated family wealth management framework

> **PRACTICAL APPLICATION**
>
> Analyze a family wealth case and determine an appropriate family office structure, priorities, and operating requirements

DAY 02

Investment Strategy, Asset Allocation and Family Portfolios

- Investment principles within family wealth management
- Establishing investment objectives and investment horizons
- Developing an investment policy framework
- Strategic and tactical asset allocation
- Portfolio diversification and concentration management
- Equities, fixed income, cash, and real estate investments
- Alternative investments and their potential role in family portfolios
- Multi-asset portfolio construction
- Investment performance measurement and portfolio review
- Portfolio rebalancing and strategic investment adjustments

PRACTICAL APPLICATION

Develop an investment strategy and diversified portfolio for a family with multiple financial objectives

DAY 03

Risk Management, Liquidity and Asset Oversight

- Identifying key risks in family wealth management
- Investment, market, liquidity, and concentration risks
- Operational, regulatory, reputational, and governance risks
- Family liquidity requirements and cash flow planning
- Managing financial commitments and long-term capital requirements
- Asset protection and operational continuity
- Selecting and evaluating investment managers and external advisers
- Oversight of assets, investments, accounts, and portfolios
- Investment and financial reporting requirements
- Building an integrated family office risk management framework

DAY 03 — CONTINUED

> **PRACTICAL APPLICATION**
>
> Analyze the risk profile of a family office and develop a liquidity, oversight, and risk management plan

DAY 04

Family Governance and Intergenerational Wealth Planning

- Principles and objectives of family governance
- Family councils, committees, and decision-making structures
- Defining responsibilities between family members and professional management
- Managing differences and challenges across generations
- Developing family wealth policies and decision-making guidelines
- Principles of intergenerational wealth transfer
- Continuity of family wealth and investment management
- Preparing the next generation for participation in wealth management
- Managing confidentiality, information, records, and financial data
- Legal, regulatory, and tax considerations within the appropriate professional framework

> **PRACTICAL APPLICATION**
>
> Design a family governance framework and an initial intergenerational wealth continuity plan

DAY 05

Advanced Family Office Management and Strategic Wealth Planning

- Developing an effective family office operating model
- Determining internal services and appropriate external service providers
- Managing investment managers, advisers, banks, and professional service providers
- Developing performance indicators and monitoring results
- Managing family office costs and resource efficiency

DAY 05 — CONTINUED

- Integrating investments, governance, risk management, and family planning
- Reviewing and updating the family wealth strategy
- Improving decision-making, information management, and reporting
- Developing family office business continuity and succession arrangements
- Best practices in professional family wealth management

FINAL WORKSHOP AND IMPLEMENTATION EXERCISE

Develop a comprehensive family office strategy covering governance, investment policy, asset allocation, risk management, liquidity, intergenerational wealth planning, service providers, and performance monitoring

Register or Request More Information

Course page: https://quest-training.com/courses/family-office-wealth-management-training-course
Website: https://quest-training.com
Email: info@quest-training.com
Phone: +905016771440