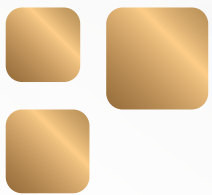




**PRIWEXUS**  
The Indian Private Wealth Network

# INDIAN SINGLE FAMILY OFFICE BENCHMARKING REPORT 2018

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# The Private Wealth Network



Priwexus is a unique membership community of single family offices, prominent business families and individuals of significant wealth in India.

It is an impartial peer-to-peer networking forum dedicated to serve all the key focus areas of successful families including investments, philanthropy, family governance, tax, legal, estate management and next-gen education.



Dear Friends,

I am delighted to present the inaugural Indian Single Family Office Benchmarking Report – a research initiative designed to develop a better understanding of trends and practices among the Indian Single Family Offices. Over 50 Indian Single Family Offices participated in an in-depth online survey and this report showcases the collective findings. We believe reports like these will help families to identify their driving purpose and to design their family office strategy.

Setting up and running a family office can be expensive and requires a significant time investment from the family members. Indian Family Office segment is its nascent stage and is expected to evolve rapidly over the next decade. A family's business or key activities may change over time but it is critical for a family office to remain adaptive and efficient and evolve with the times at an equal pace. This report is an effort to facilitate crucial peer to peer learning among Indian Single Family Offices and assist them in getting ready for the change.

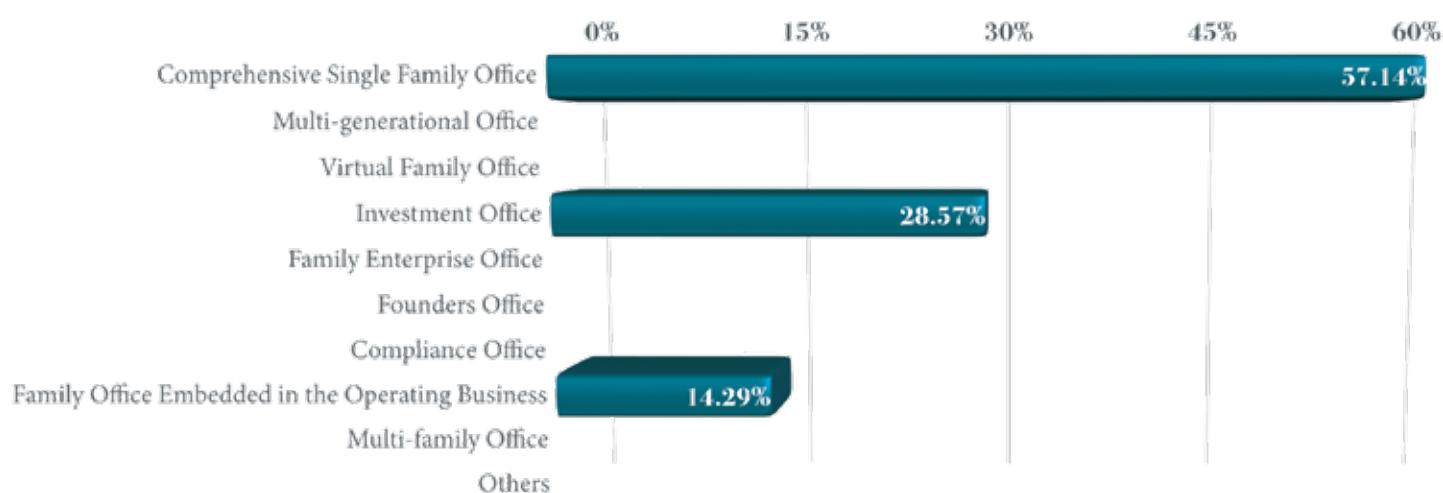
I would like to take this opportunity to thank all those family offices who have participated in this study.

I hope you will find this report insightful and it will help you get a better understanding of Indian Single Family Offices. I look forward to your thoughts and feedback.

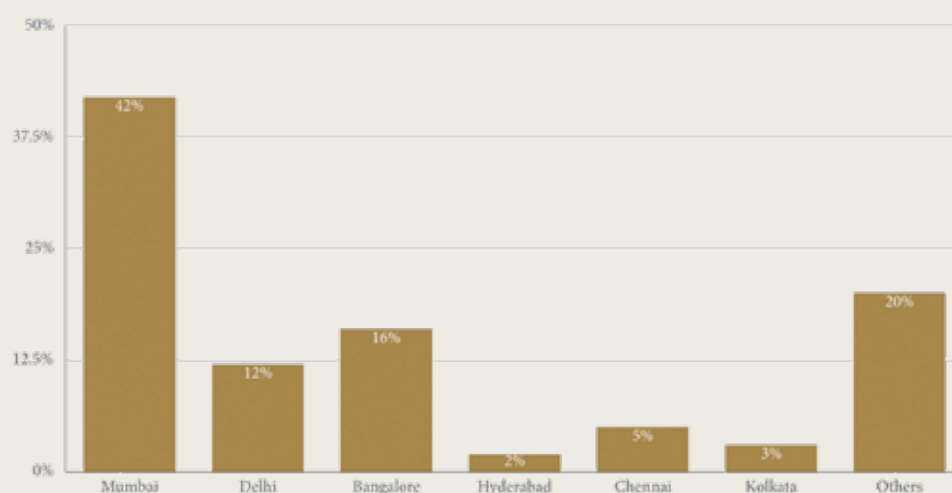
Best wishes,

Aditya Gadge  
Founder  
Priwexus

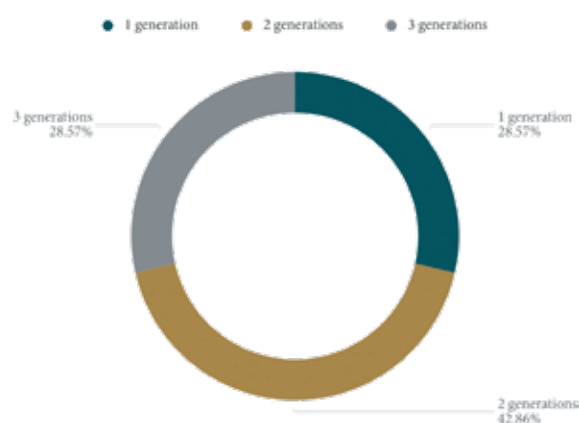
## What best describes the structure of your family office?



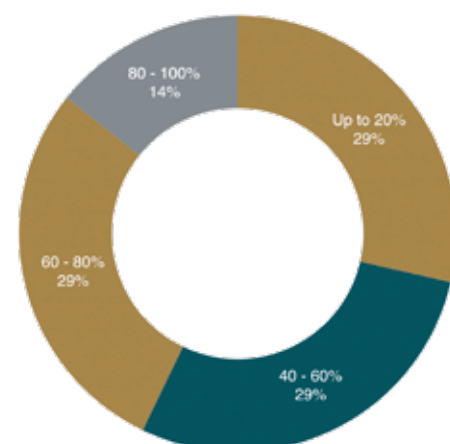
## Where is your family office primarily located?



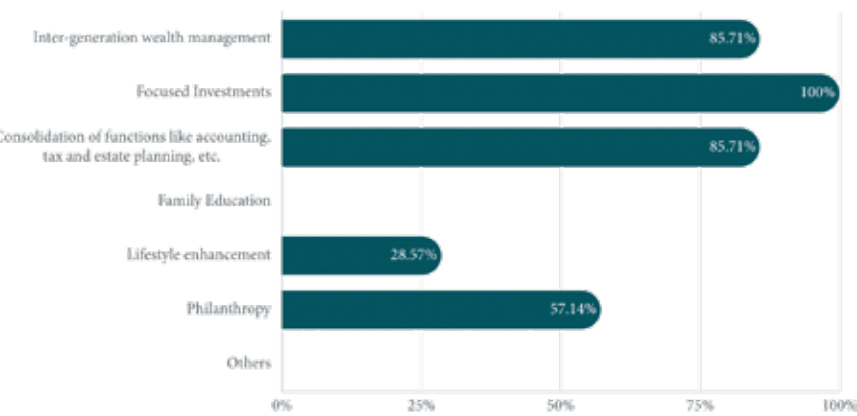
## How many generations are being served by your family office?



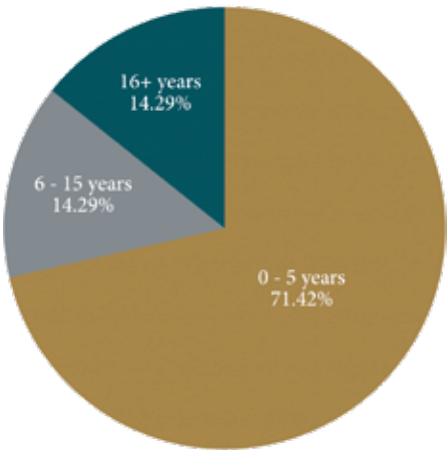
## What share of your family's networth is tied to your operating business/es?



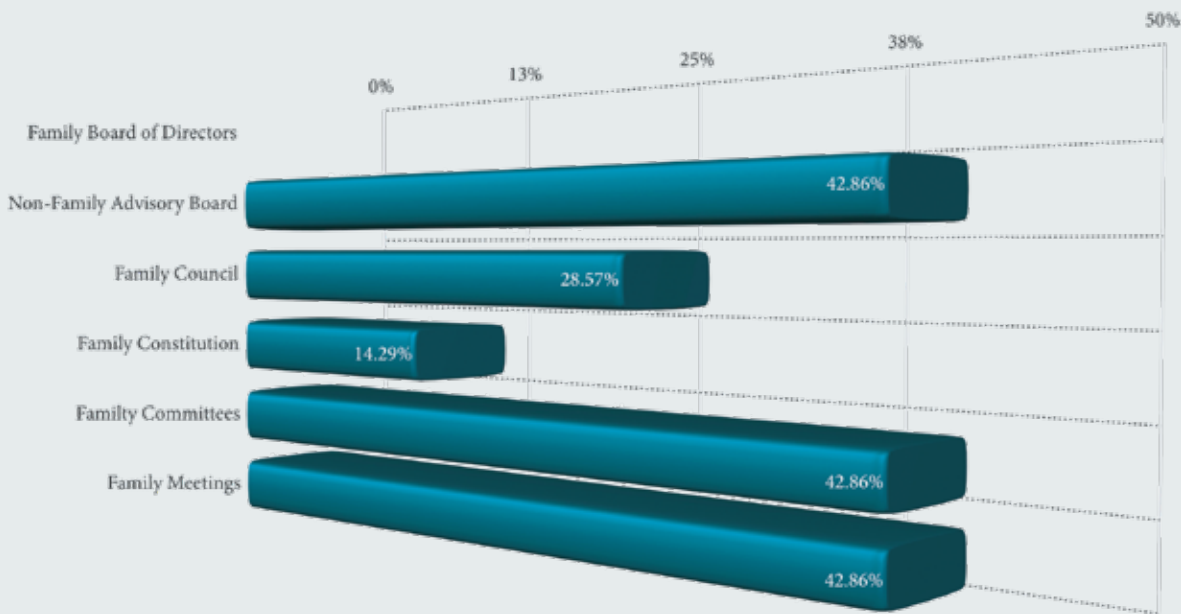
How important are the following objectives for your Family Office?



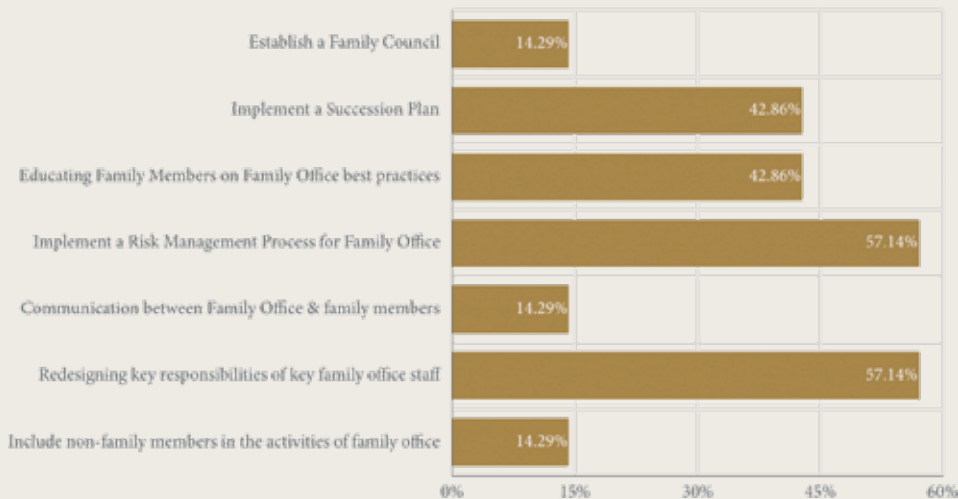
How many years has your Family Office operated in its current form?



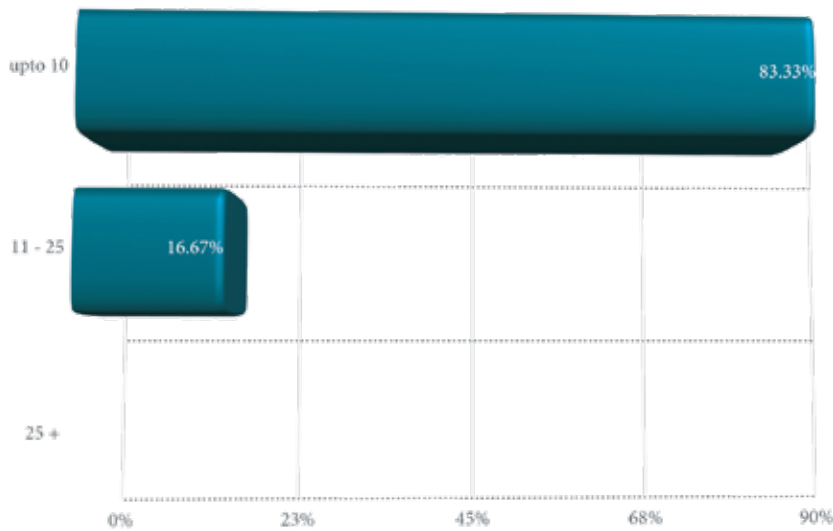
What governance structure have you put in place to manage your Family Office?



What are your top governance priorities over the next 12 months?



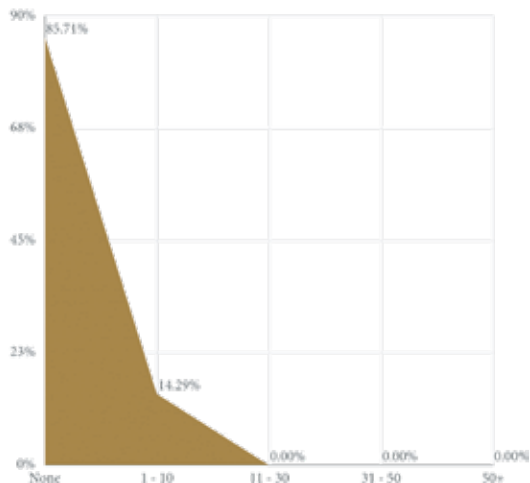
What is the number of non-family member employees working for your family office?



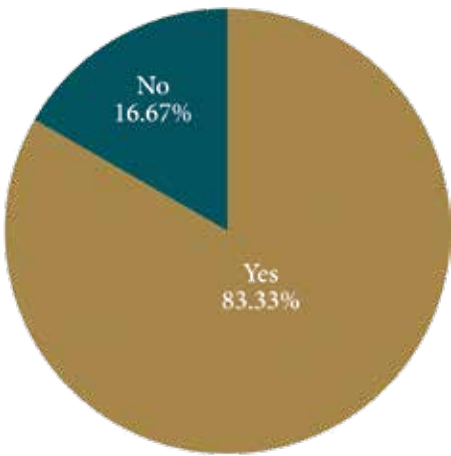
How do you hire employees for your family office?



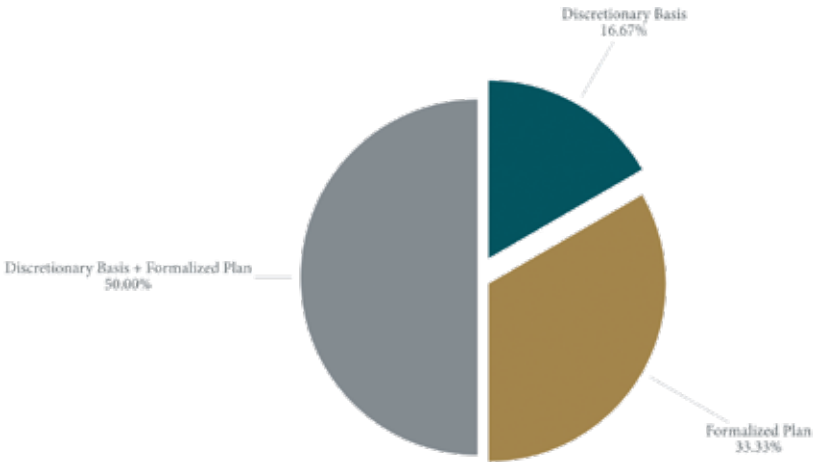
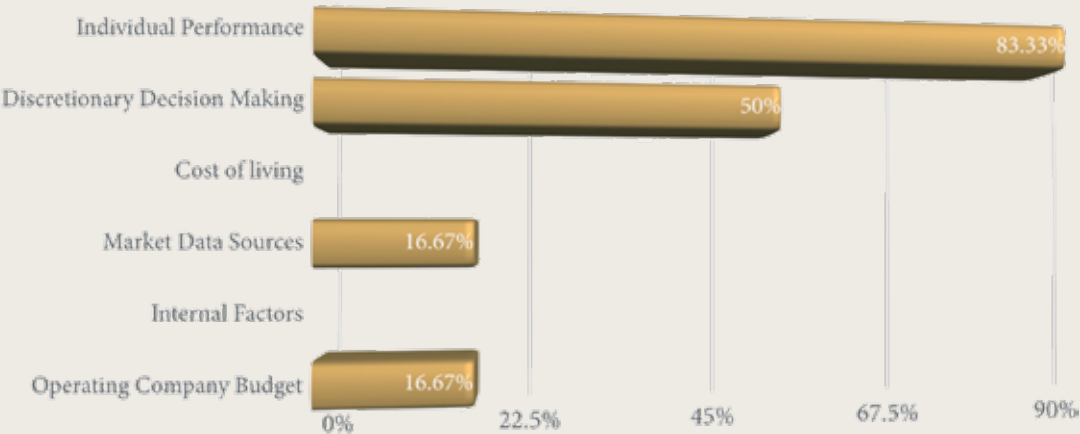
What percentage of employees are also a part of your other operating businesses?



Do you have formal employee agreements in place for your family office executives?

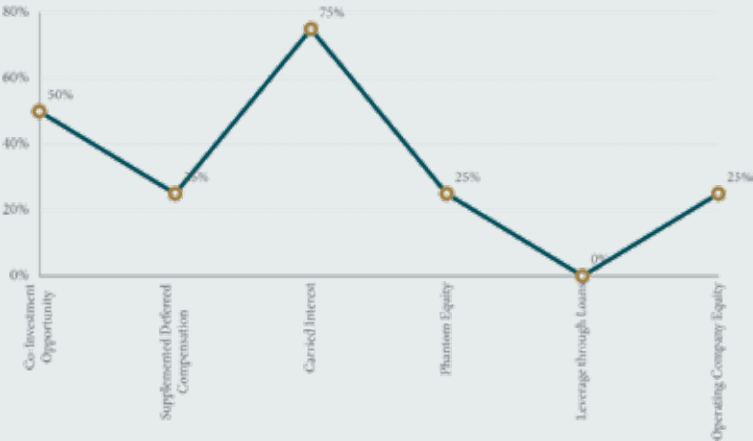


How do you determine the salaries and annual increments for the professionals managing your family office?



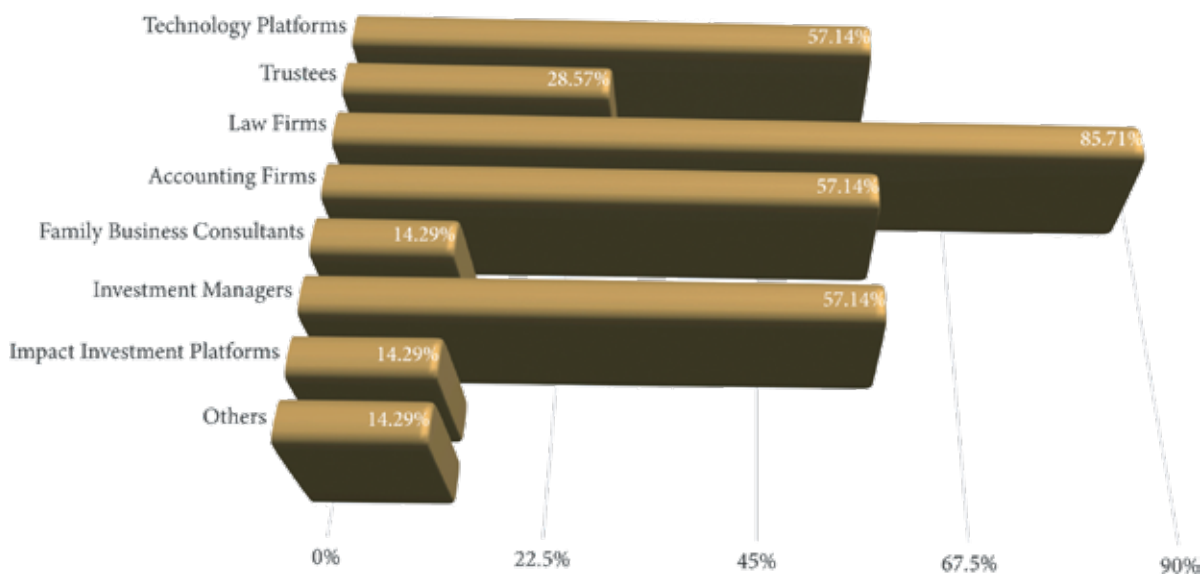
On what basis do you award bonuses to your family office staff?

What kind of Long-term incentive plans do you offer to your Family?

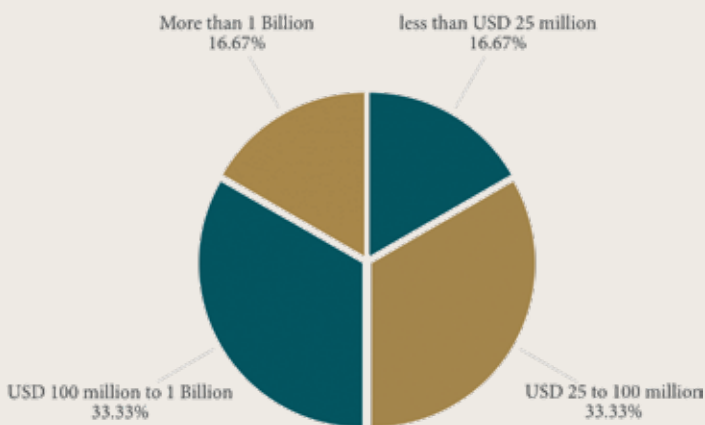




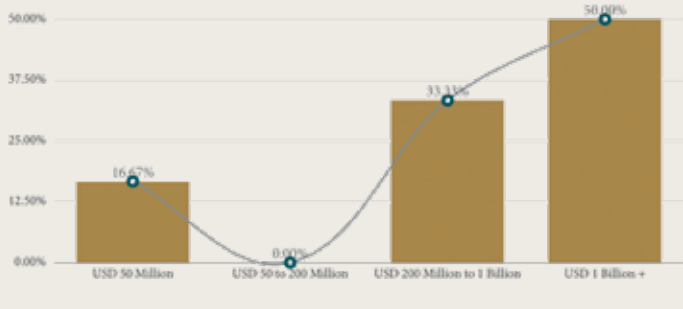
What kind of external service providers do you work with for smooth functioning of your family office?



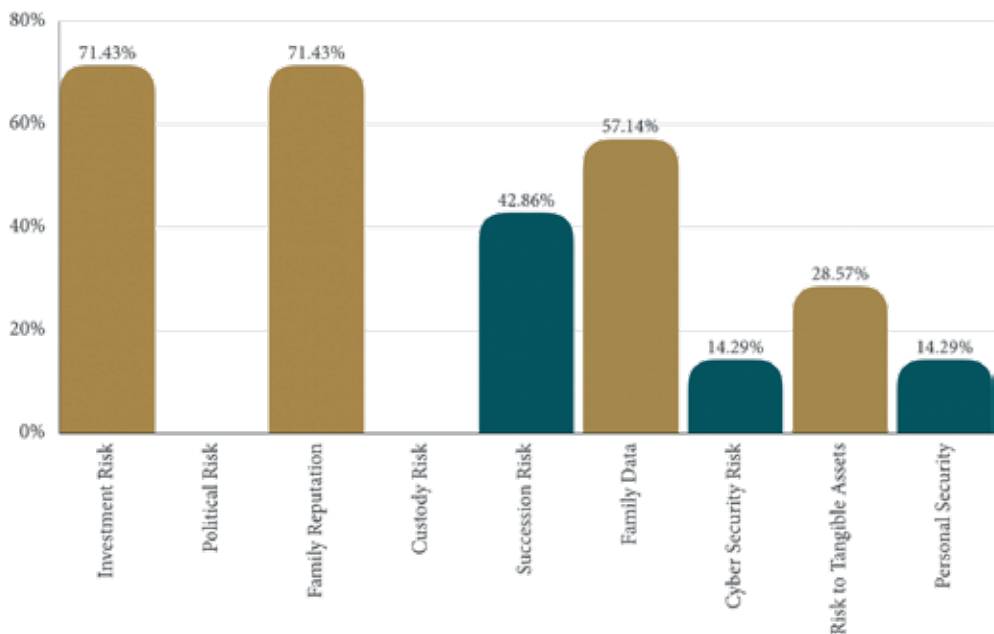
What is the AUM of your Family Office?



What is the net-worth of the principal family?

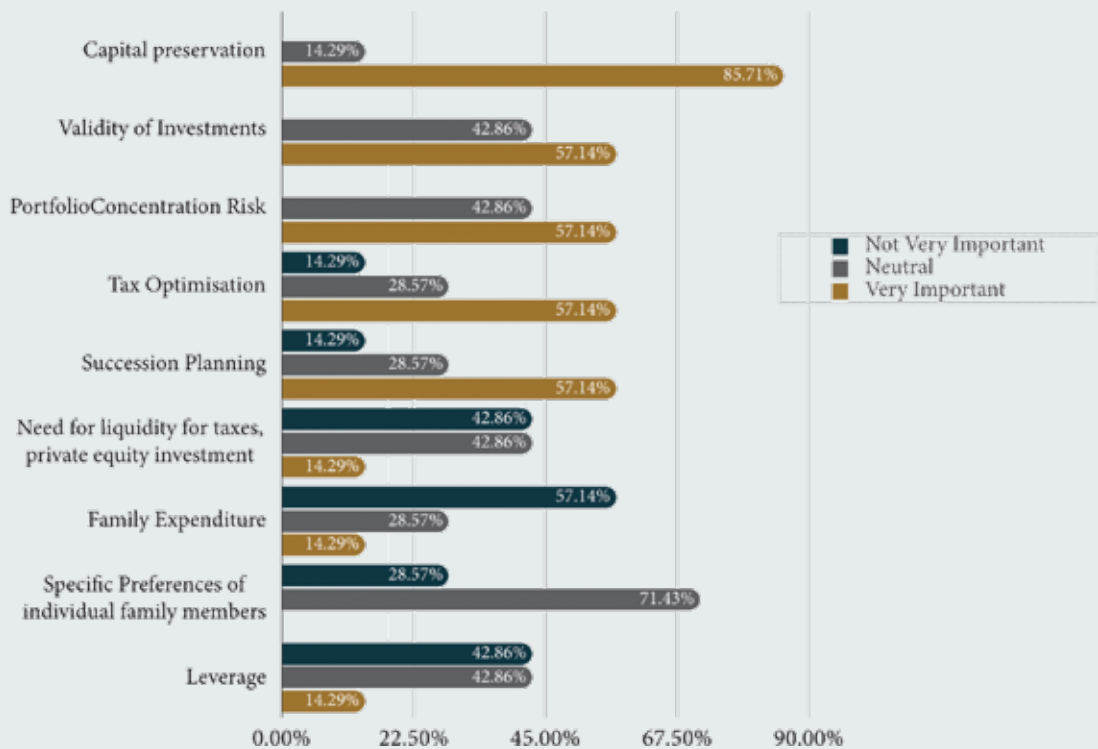


What risks are of most concern to you?

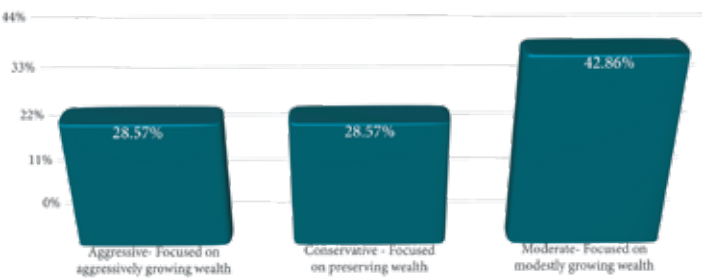




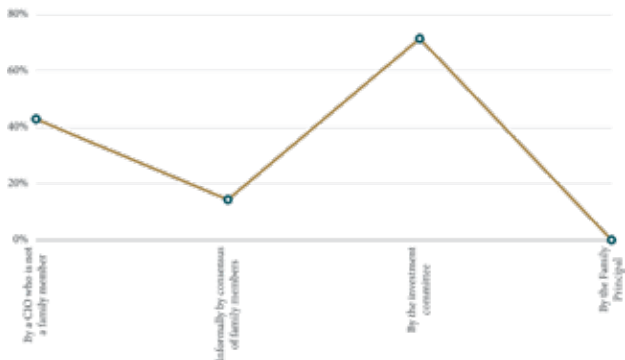
How important are the following in driving your investment decisions?



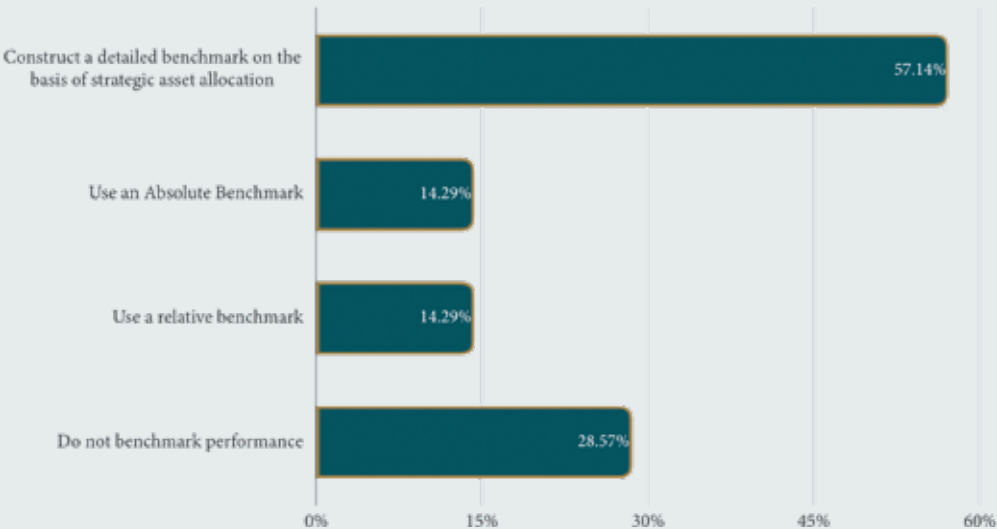
What is your risk appetite for financial assets?



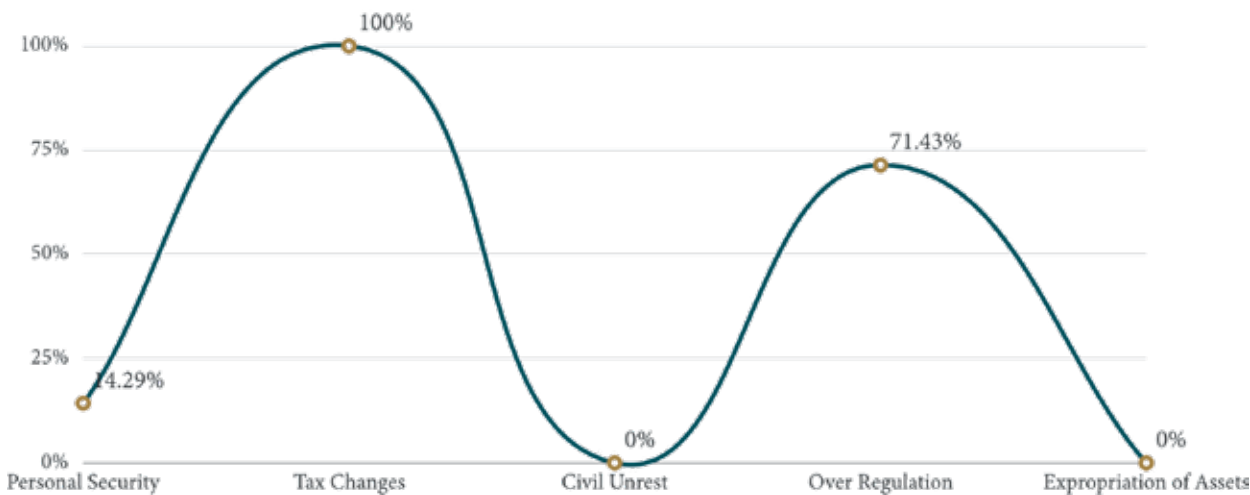
How are investment decisions made?



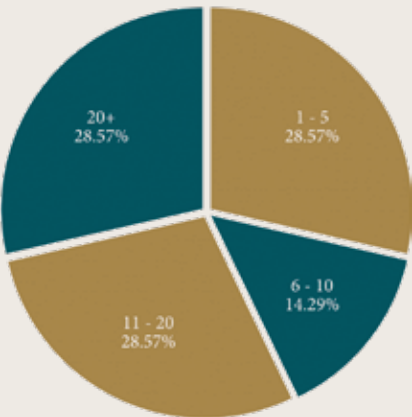
How does your Family Office benchmark performance?



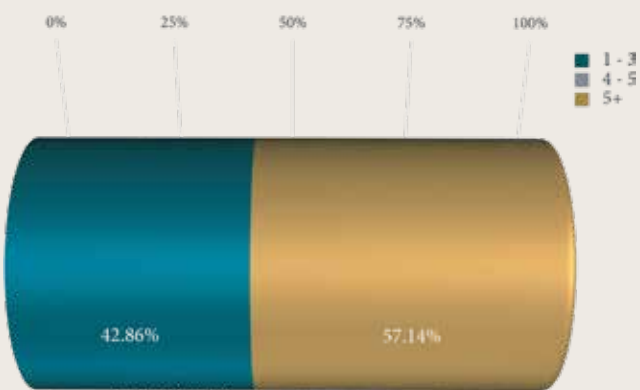
Which aspect of socio – political risk concerns you most?



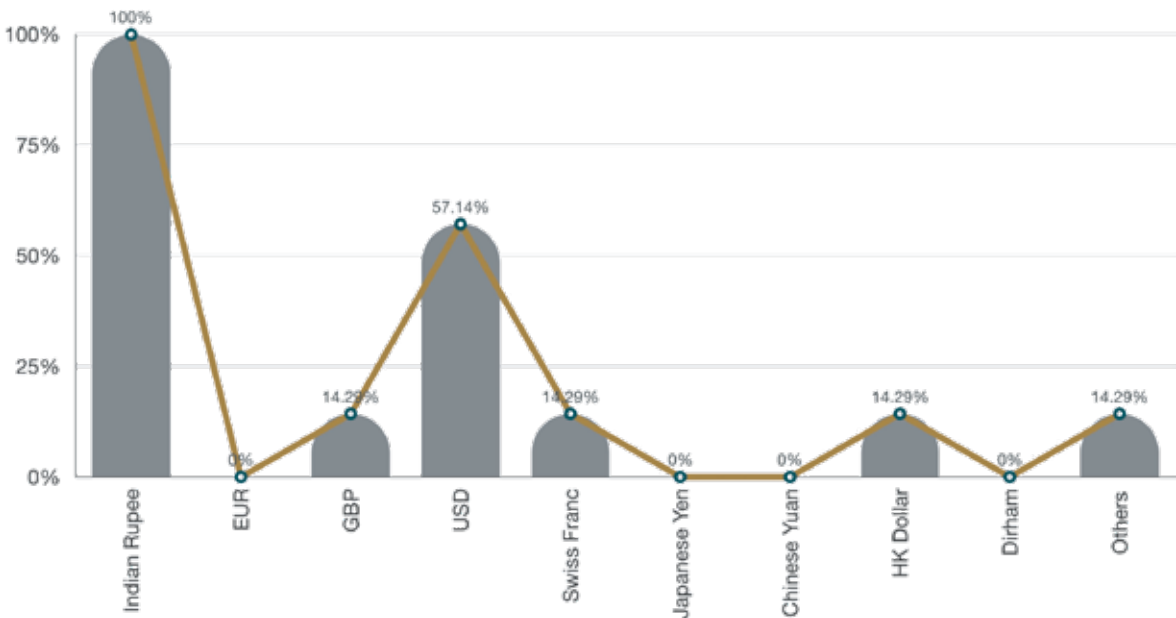
How many investment ideas do you receive each month?



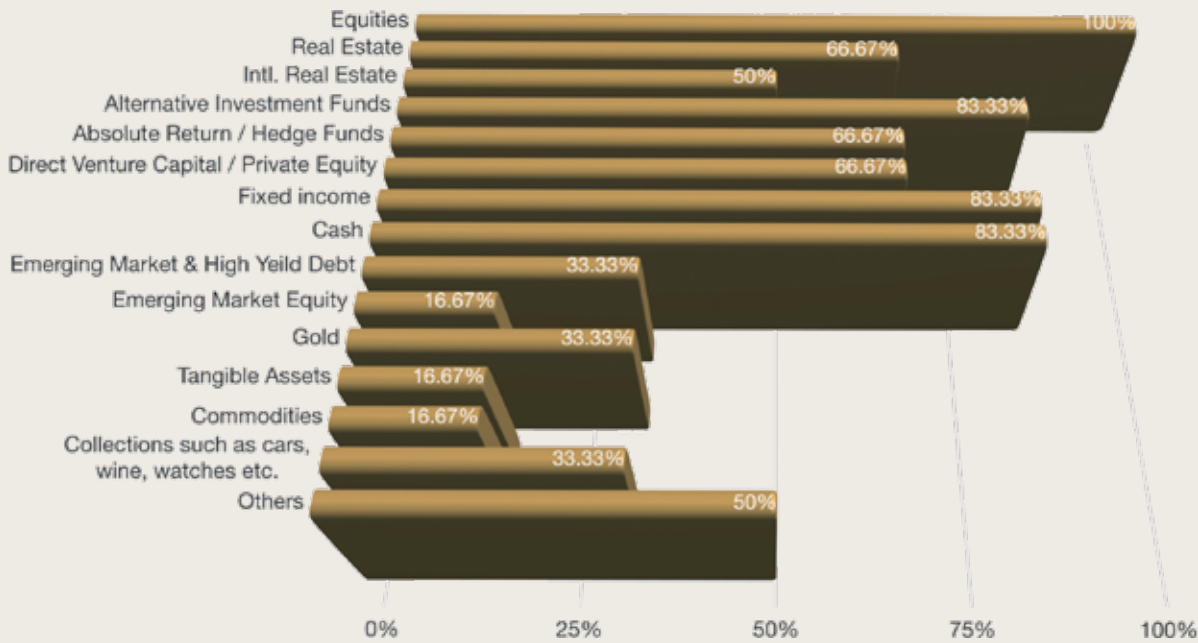
How many news opportunities do you invest in over a year?



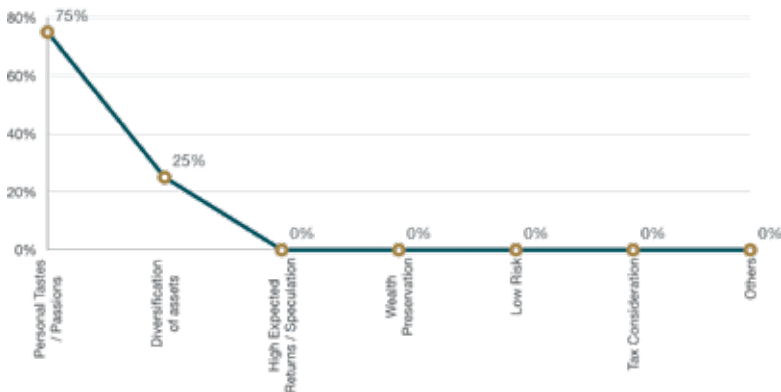
Which currency(ies) are your investments most exposed to ?



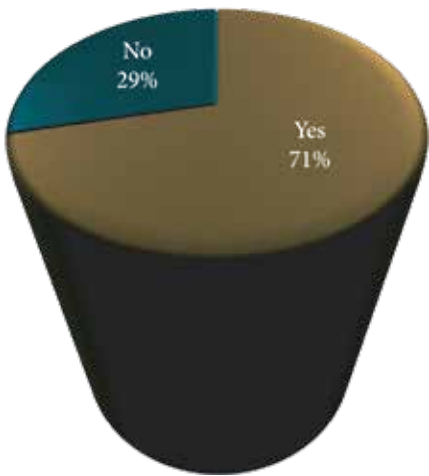
What is your Family Office's current asset allocation split? (in %)



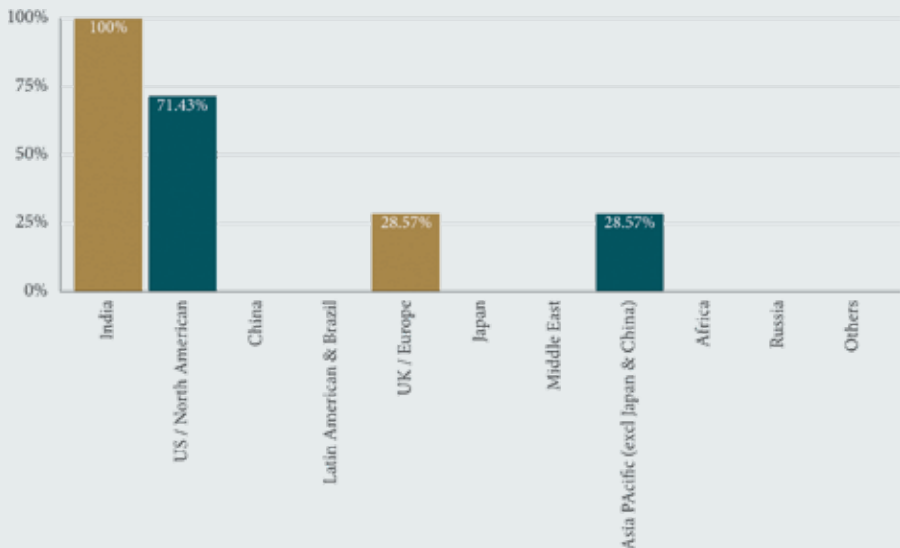
What are your reasons(s) for investing in tangible assets / collectables ?



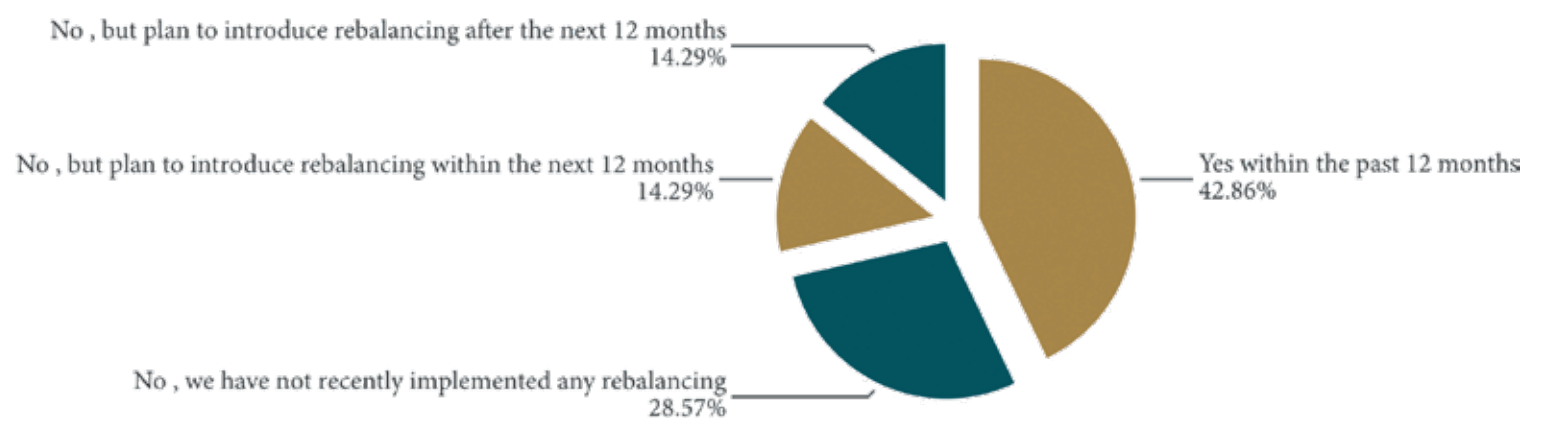
Do you have a defined strategic asset allocation model?



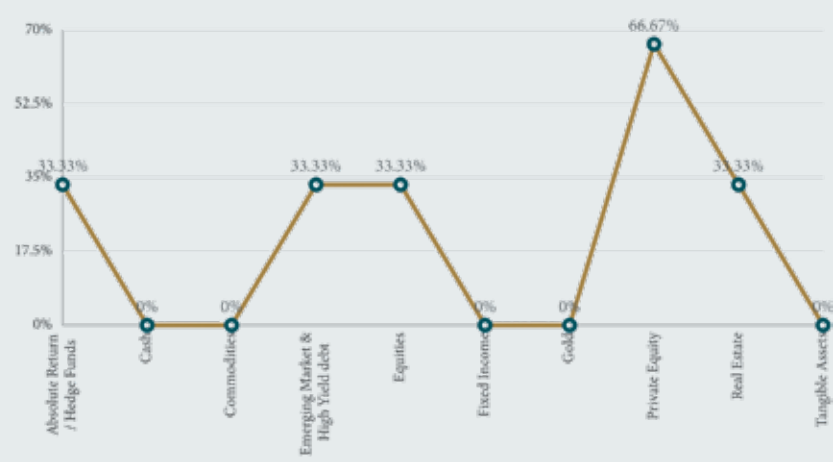
What is your current asset allocation split by geography?



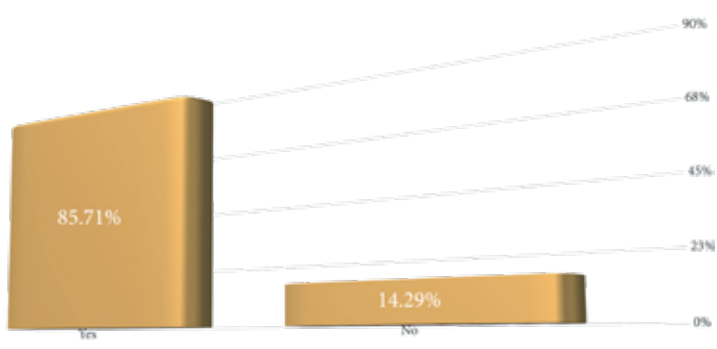
Have you recently rebalanced your portfolio?



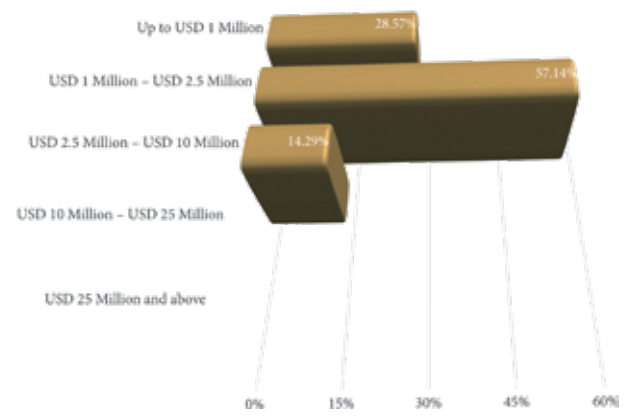
Provide an estimate as to how your allocation might change in the next 12 months? (in %)



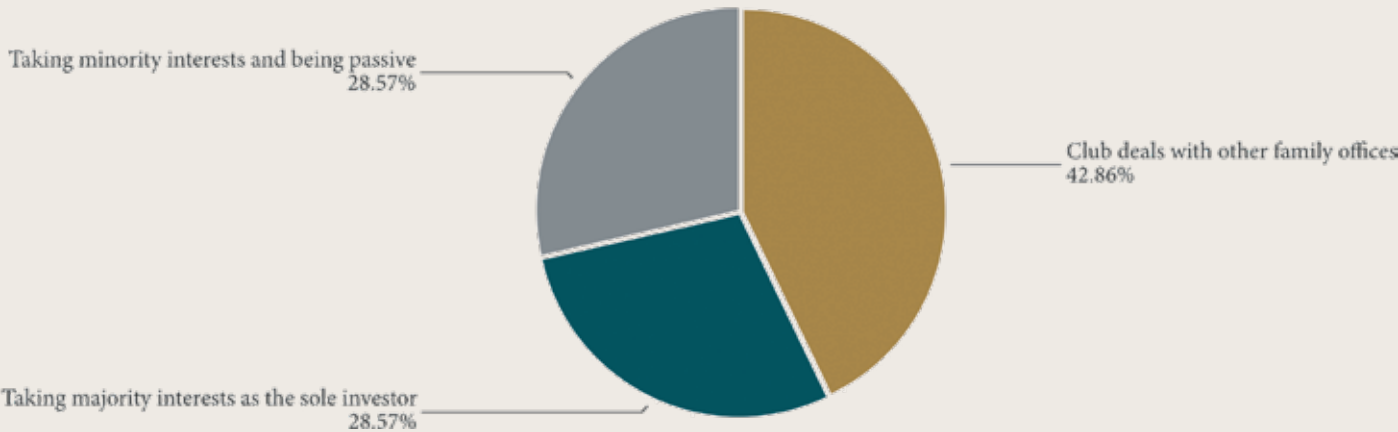
Has your family office made any direct investments?



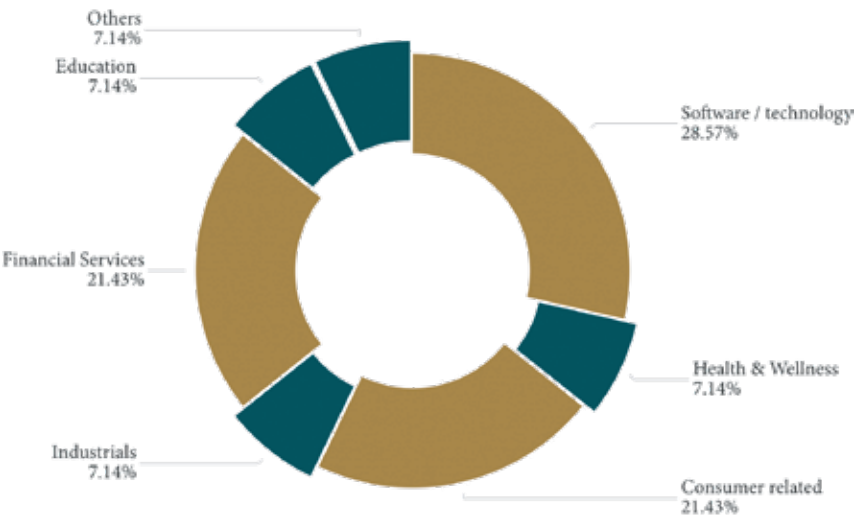
What is the range of investment you would make into any one investment directly (In USD)?



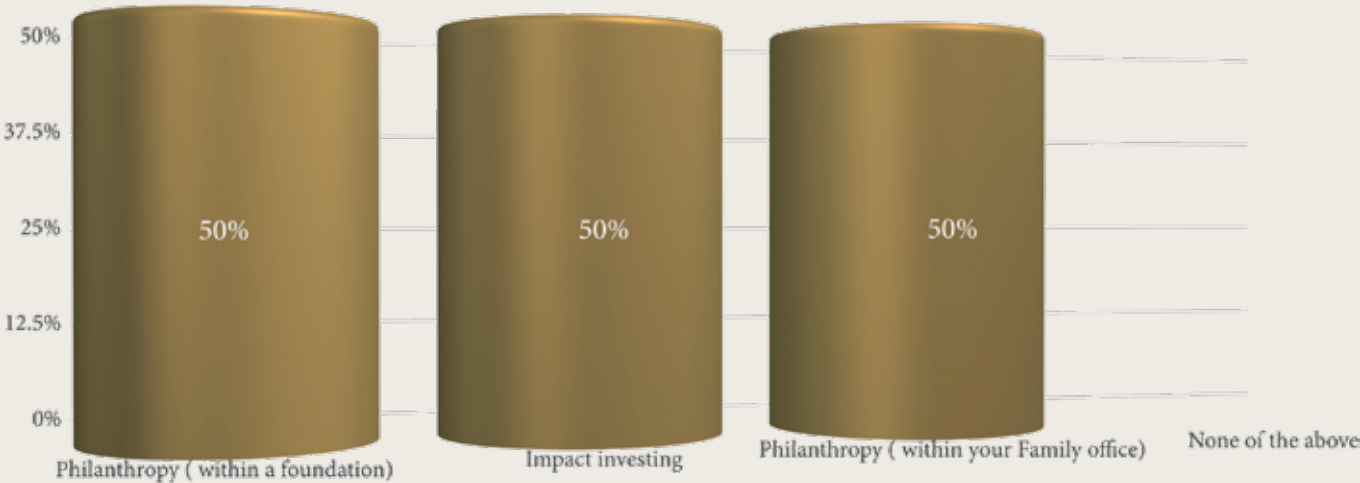
With regards to investing directly , which of the following appeals to you most?



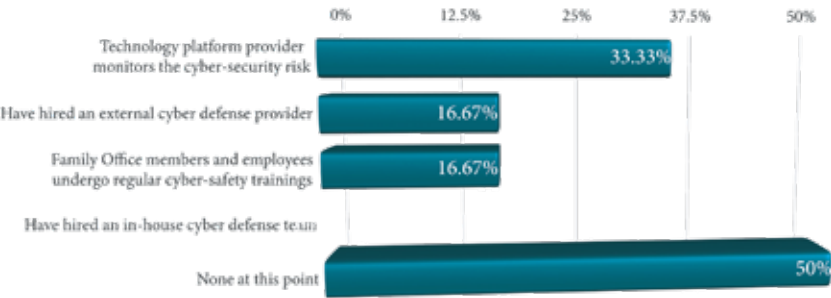
Which private company ( sectors ) enthuse you most from an investment perspective?



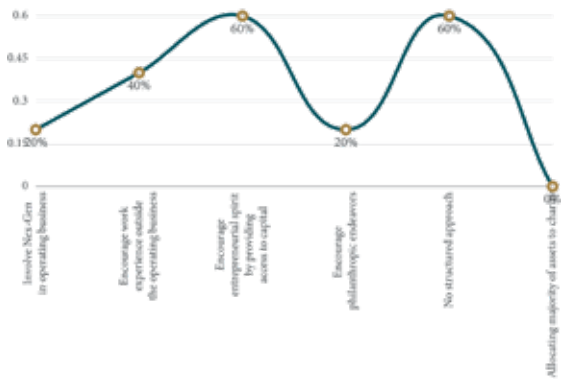
Which of the following activities does your Family office engage in?



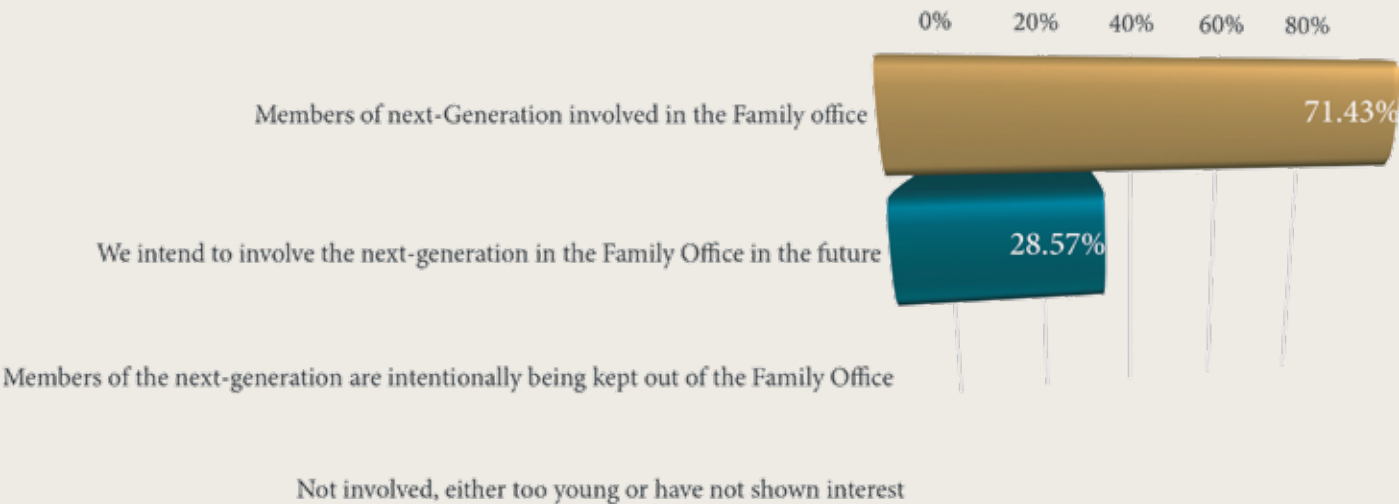
How are you managing your cyber-security risks?



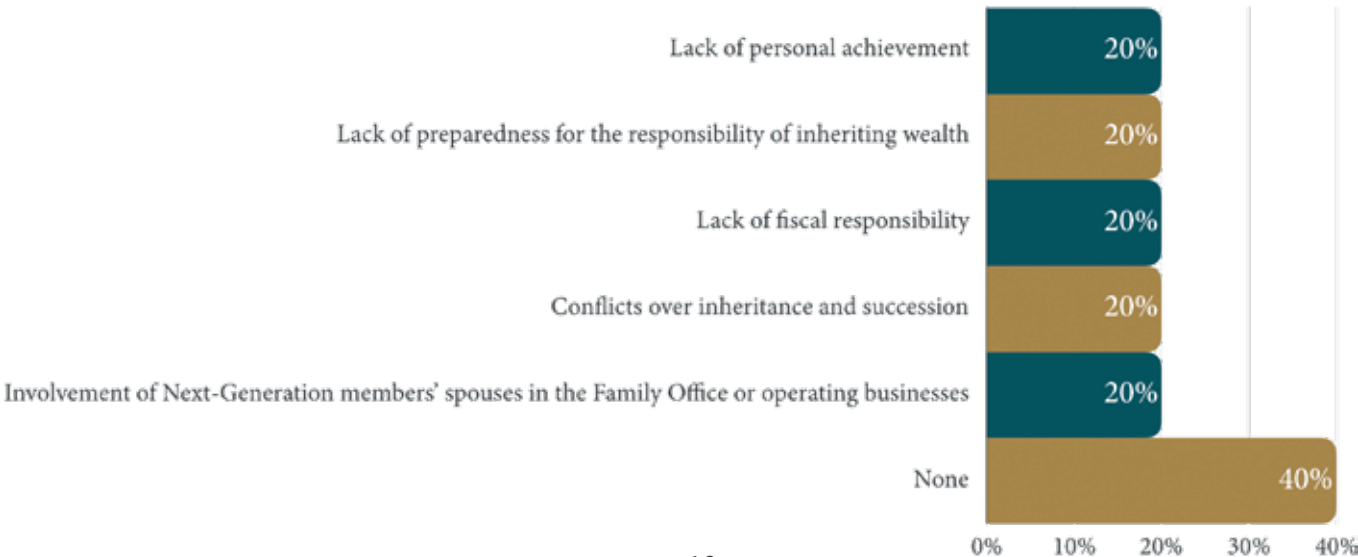
What measures are you putting in place to ensure that the Nex-Gen has a sense of personal achievement?



Are your Next-Generation Family Members involved in the Family Office?



With respect to Next- Generation, what are the areas of concern?





Announcing  
Priwexus's inaugural members-only event

# GEN-NEX LEADERS SUMMIT 2018

For more details on Priwexus memberships,  
please reach out to [info@priwexus.com](mailto:info@priwexus.com)





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