FAMILY OFFICE BLUEPRINT

Preview sample - planning and coordination only

A written operating system for multi-generation wealth.

Included outputs

1. Wealth Philosophy Profile
2. Risk DNA Report
3. Legacy Blueprint
4. Decision Framework
5. Giving Compass
6. Meeting Playbook
7. Play Alignment Engine

How it works

1. Start the Family Constitution Starter
2. Generate the Blueprint in X1
3. Run the weekly CFO summary
4. Share advisor-ready packets

Execution loop

Weekly CFO Summary + Decision Log
+ Advisor Packets keep the plan alive.

WEALTH PHILOSOPHY PROFILE

Sample output

Investment purpose

Preserve family autonomy and fund builders, investors, and givers.

Core principles

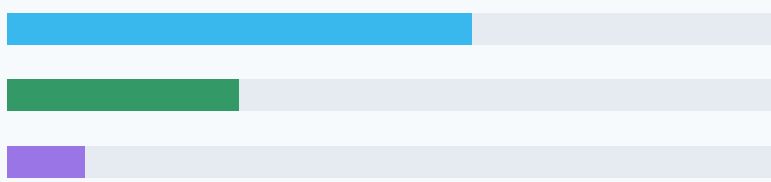
1. Liquidity before illiquidity.
2. Risk must serve the family mission.
3. Every major decision gets a written rationale.

Allocation posture

Foundation 60%

Growth 30%

Opportunity 10%



Values alignment note

Every strategy is scored against your principles.

Alignment before execution.

Behavioral posture

Builder-operator, prefers measured risk with documented downside.

Guardrails

Max single-position exposure: 15%

Minimum liquidity buffer: 18 months

Re-evaluate strategy if net cashflow drops 20%+

Decision triggers

Liquidity below 12 months, initiate review within 7 days.

New investment over $250k requires family vote + rationale.

Monitoring cadence

Weekly check-in. Quarterly review. Annual reset.

DECISION FRAMEWORK + MEETING PLAYBOOK

Sample output

Decision tiers

Operating: decisions under $50k handled by parents.

Strategic: decisions over $50k require family vote.

Voting rule: 2/3 majority with written rationale.

Annual meeting agenda (preview)

1. Review values and legacy goals
2. Review liquidity and current exposures
3. Approve major investments + giving focus
4. Assign next actions and owners

Communication cadence

Monthly check-ins, quarterly reviews, annual summit.

Every decision gets a short written rationale.