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2026 National Family Office Forum report

March 2026

Accelerate the possible: Drive with purpose

At the heart of this year's Deloitte Family Office Forum was a call to action: run headlong into complexity, embrace uncertainty, and design the family office of tomorrow with courage and intent. Across plenary and breakout sessions, participants were challenged not just to respond to change, but to author it—drawing on collective wisdom to turn obstacles into catalysts for transformation. The following analysis brings together insights from across the event, weaving the lessons and stories of the forum's most impactful sessions. We also share highlights from our daily pulse surveys, which echo and deepen these themes—and point to where family offices see the greatest urgency and opportunity.

Let's dive in and take a closer look at three big ideas reflected in the 2026 program:

Putting AI, data, and technology to work: Shifting from using technology to support today's work to using artificial intelligence (AI), integrated data, and modern platforms to expand what the family office can do next—faster decisions, tighter governance, and more scalable operations. It requires treating data as a strategic asset (not just a risk), operationalizing it through effective systems, and applying AI to increase insights and execution speed—so the office leads change proactively rather than reacting to it.

Proactively pressure-testing readiness and protecting what matters: Building resilience before disruption hits—regularly stress-testing people, processes, and controls so the office can protect privacy, assets, and reputation under real pressure. It requires shifting from reactive risk management to an operating rhythm of scenario planning, clear decision rights, and coordinated response across cyber, fraud, regulatory, and tax changes—so the family can stay secure and confident even as challenges and rules evolve.

Strengthening governance, talent, and legacy stewardship: Professionalizing how the family office is led and sustained—clear decision rights, strong accountability, and deliberate stewardship that scales with complexity and generational changes. It requires investing in leaders and teams who earn trust and deliver, while translating family values into repeatable decisions so the legacy stays active, adaptable, and aligned across generations.

The results spoke for themselves: by accelerating the possible and driving with purpose, family office leaders shaped a future of strength, opportunity, and enduring achievement. Their proactive mindset and positive engagement transformed potential challenges into sources of growth and lasting success, while also reconnecting with and building relationships with peers in the industry.

We look forward to our continued dialogue, shared learning, and the opportunity to work with you to apply these takeaways in a manner that delivers value and enduring impact.

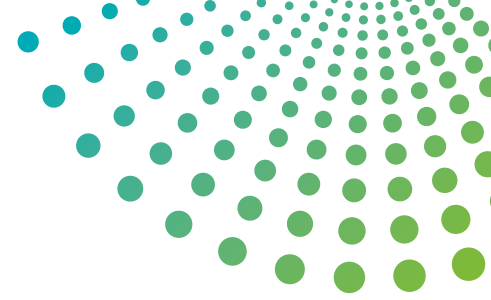
Sincerely,

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Harnessing Bold Action in a Changing World

Deloitte's National Family Office Forum (NFOF) is designed to help family office leaders translate purpose into action—making sharper decisions, strengthening resilience, and identifying where new capabilities can unlock outsized impact.

Topics covered at our 2026 National Family Office Forum

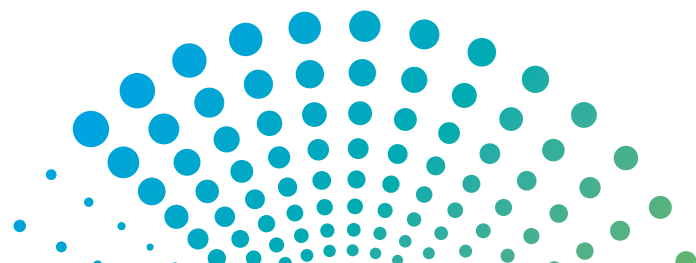
| Type | Topic |
|--|--|
| Peer group discussions | Cybersecurity and fraud |
| | Technology strategy for the family office |
| Plenaries | A global economic outlook and the current geopolitical climate |
| | AI in the Family Office |
| | Preparing for and responding to the death of our principal |
| Professional & leadership development electives | Creating influence by leveraging your relationships |
| | Creating opportunities through collaboration |
| | Driving agility: Managing performance in others |
| | Technology tips and trends |
| Tax & Advisory electives | Cyber wargaming: An immersive simulation |
| | Evolving controversy risks for family offices |
| | Family office structures: Leading practices to create accounting, tax and operational efficiencies |
| | Fraud in the family office: trends, risks, lessons learned |
| | Planning for impact: Creating clarity today to enable responsible stewardship tomorrow |
| | Protecting the legacy: Data governance for the modern family office |
| | Strategic insights: Navigating compensation in family offices |
| | Tax crossroads: Navigating through change |
| | The future of finance for family offices |
| | The human side of wealth: Practical strategies for family office leaders |
| | The talent equation: HR essentials for family offices |
| Trends in family governance | |



Putting AI, Data, and Technology to Work

In imagining their future, family office leaders recognized that technology is more than a tool—it is the engine behind proactive transformation. The forum’s narrative began with a practical plenary on AI in the family office, focused on how offices are moving from experimentation to real operational impact through proven use cases, strong data foundations, and thoughtful tool selection and change management. These themes echoed through breakouts such as Technology Tips and Trends and Financial Reporting Systems for the Family Office, where participants didn’t just absorb leading practices; they glimpsed

a future where AI-driven innovation redefines decision-making and operational velocity. Stories surfaced of offices that, through Protecting the Legacy: Data Governance for the Modern Family Office, turned their information from a liability into a strategic advantage—demonstrating the rewards of acting before disruption strikes. Meanwhile, the collaborative spirit fostered in the Peer Group Discussion: Technology Strategy for the Family Office underscored the value of sharing bold experiments, learning from missteps, and enhancing what works, all in service of leading the digital change rather than following it.



Pulse Survey Highlights

When asked to name one action they will take to drive measurable impact through AI, data, or technology, respondents' answers clustered around six priorities:

- 1 ▶ **Move from experimentation to specific, measurable AI use cases**
- 2 ▶ **Upskill, drive adoption, and manage the people side of change**
- 3 ▶ **Improve data foundations to unlock AI value**
- 4 ▶ **Evaluate, modernize, and future-proof the tech stack**
- 5 ▶ **Establish governance and bring in the right expertise**
- 6 ▶ **Keep security and resilience as parallel Day 1 workstreams**



Proactively Pressure-Testing Readiness and Protecting What Matters

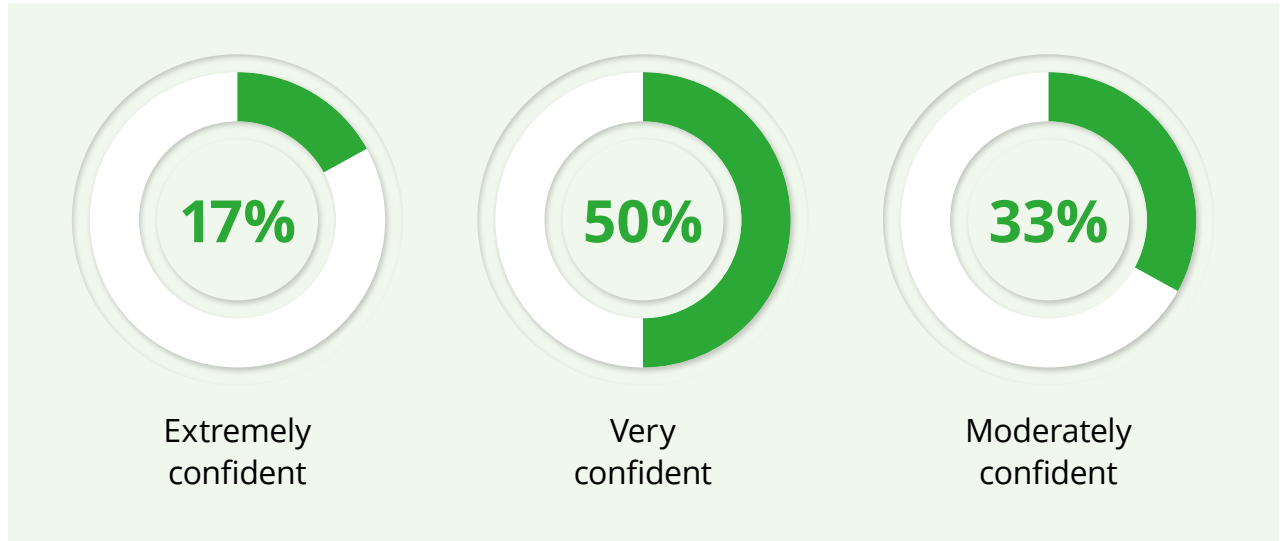
Throughout the forum, the imperative was clear: don't wait for adversity—simulate it, prepare for it, and emerge stronger. The immersive experience of Cyber Wargaming: An Immersive Simulation thrust participants into crisis, where they discovered where cyber vulnerabilities may exist in their offices, but also how they can lead under pressure. This spirit of anticipation wove through Fraud in the Family Office: Trends, Risks, Lessons Learned and Evolving Controversy Risks for Family Offices, where attendees grappled with stories of AI-driven fraud and how to prepare their employees to respond when it arises. Rather than

passively adapting to threats, the room was filled with strategies for getting ahead—embedding prevention and resilience into the culture of the family office. In Tax Crossroads: Navigating Through Change, the story continued as families practiced new ways to navigate policy change, learning not to react but to plan, to coordinate, and to find opportunity in ambiguity. The narrative, woven through each session, was about choosing vigilance, fostering collaboration, and approaching risk with clarity and a sense of opportunity to achieve the family's goals and protect their brand.



Pulse Survey Highlights

When asked how confident they are in their organization's readiness to protect what matters, respondents reported:



When asked to name one area they will pressure-test to confirm they are truly ready, respondents prioritized:

- 1 **Cyber incident readiness and crisis playbooks**
- 2 **Human risk reduction and control hygiene**
- 3 **Data privacy, governance, and AI/application risk**
- 4 **Wealth, estate, and tax readiness items**

Strengthening Governance, Talent, and Legacy Stewardship

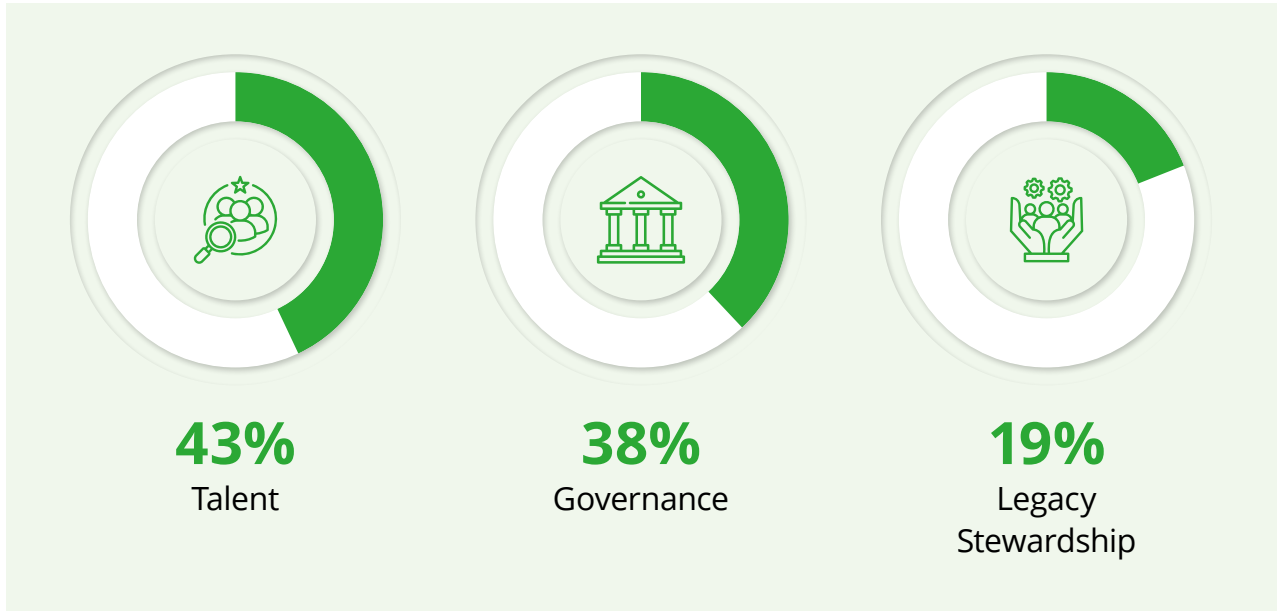
The journey of governance and stewardship was painted with stories of persistence, evolution, and intentionality. The reflective wisdom in *Preparing for and Responding to the Death of Our Principal* offered a case study in the long game: decades of planning, deliberate decisions made, and the ultimate affirmation that readiness brings the gift of grace. In conversations around *Trends in Family Governance and A Global Economic Outlook* and the *Current Geopolitical Climate*, leaders explored how rigorous frameworks and agile thinking can coexist, enabling offices to adapt to shifting family dynamics and an unpredictable world. Across sessions such as *The Human Side of Wealth: Practical*

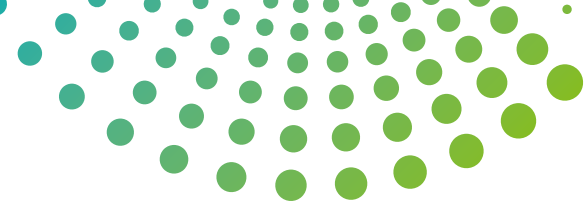
Strategies for Family Office Leaders and The Talent Equation: HR Essentials for Family Offices, *Creating Influence by Leveraging Your Relationships*, the story was one of investing in people—building trust, cultivating next-generation talent, and enabling teams to act with confidence rather than caution. *Planning for Impact: Creating Clarity Today to Enable Responsible Stewardship Tomorrow* brought the narrative full circle, as family offices learned to align their values with action, transforming legacy from a static inheritance into a living, adaptive force. Through every story, the message remained: stewardship is not passive; it is the art of making deliberate, forward-looking choices.



Pulse Survey Highlights

When asked which area they plan to act on first in the next 30 days, respondents prioritized:





In Conclusion

“Accelerate the Possible” was not merely a theme, but a call to collective authorship. Participants left the Deloitte Family Office Forum with a renewed mandate: harness the lessons of technology, readiness, and stewardship; run toward challenges; and shape a future defined not by what happens, but by what is made possible through bold, proactive leadership.

If you have any questions, or simply would like to continue the discussion, please [contact us](#). We look forward to seeing you at the 2028 conference at Deloitte University!



Quotes:

“ Everything about the event was excellent: the location, content and moderators were all great! ”

“ I really enjoyed the interactive format of each session and the range of opportunities for networking and meaningful peer discussion. ”

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