Reshaping the Future of Wealth

Family Office Trends

For family offices, concerns around diversification, technology, and sustainable investing are spurring a re-examination of business as usual.

What's on their minds?

1



Increased allocation in alternative investments

Family offices tend to have **outsized exposure to alternative investments**. A recent Goldman Sachs family office survey shows respondents' portfolios have, on average, a **45%** combined allocation to private equity, real estate, hedge funds, and private credit.

Goldman Sachs, Widening the Aperture, Family Office Investment Insights, 2021

Renewed interest in ESG investing

2



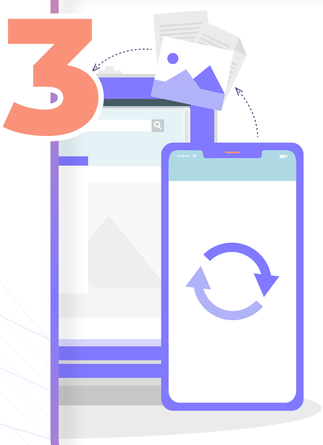
39% of family offices intend to allocate most of their portfolios sustainably over the next five years, targeting exclusion-based strategies

UBS 2020 Family Office Report

In 2019, **9** of the biggest ESG mutual funds in the US **outperformed** the S&P 500.

FT.com

3



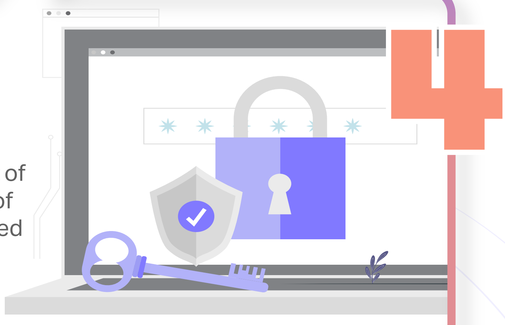
Technology-facilitated information access

"…[T]here is a need for more **transparency** and a growing expectation of better **real time data** to drive decision making. This is not just from family members, but across the investment ecosystem and it will only increase. Meeting the demands for **better reporting** is resource intensive and family offices are finding that new technologies can help free up their headcount to focus on activities that deliver the long term strategy."

Danielle Valkner, Family Office Leader, PwC US
Technology trends for family offices

Cybersecurity and online privacy

4



Nearly **60%** of global family offices surveyed said cybersecurity topped the list of late-night worries, and **96%** of respondents have experienced at least one cyberattack.

Northern Trust 2020 Family Office Benchmarking Survey

Allvue's expertise in developing fully-integrated technology solutions allows family offices to easily manage investments, reconcile positions, pay bills, and report both marketable and illiquid holdings across their entire portfolio. Learn how Allvue can help you.

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