

# GLOBAL FAMILY OFFICE SUMMIT

October 19–23, 2026 | Château d'Hauteville, Switzerland



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# Global Family Office Summit

Business families uniting in purpose, generosity, excellence, and social impact.

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## A Holistic Approach to a Holistic Venture

Taking place at the historic Château d’Hauteville—Pepperdine’s breathtaking 90-acre international campus in Switzerland—the Global Family Office Summit will strengthen established family business networks and explore new opportunities among Pepperdine-affiliated families stewarding multigenerational wealth. This exclusive, invitation-only gathering is designed to provide a secure and intellectually stimulating environment for the education, support, and empowerment of high-net-worth families committed to building enduring legacies that reflect their deepest values and greatest aspirations.

The summit’s main objective is to help families transform wealth from a potentially divisive resource into a lasting legacy that instead will unite generations and create a positive impact on communities around the world. During the event, participants will engage with respected experts, seasoned professionals, and visionary leaders from the Pepperdine community and around the world. Through meaningful workshops and conversations, families will gain valuable insights into family governance and philanthropy.

The summit will open and close with large group events, while the remainder of our time together will include hands-on workshops and interactive sessions with world-class experts, providing practical tools and evidence-based strategies to strengthen succession planning, drive innovation, and safeguard the reputation of family enterprises into the future. Participants may select and preregister for those workshops that are most relevant to them and their family.

In addition, the summit will emphasize the importance of building connections among families who share common values and a commitment to social impact. Opportunities for collaborative learning and purposeful dialogue are woven throughout the program, fostering meaningful relationships and encouraging collective action. (Note: Attendance is highly cultivated. A no-sell environment will be maintained by Pepperdine leaders as well as expert guest speakers).

Proceeds from the summit will benefit Pepperdine’s efforts to support family office programs, advancing academic excellence and public service by strengthening the essential foundation of society—the family. Participation in this unique gathering reflects a deep commitment not only to the future of the family office, but also to the timeless pursuits of generational wisdom, ethical leadership, and purposeful philanthropy.

## Summit Highlights

Together, we’ll explore the following subjects vital to a thriving family business:

### FAMILY GOVERNANCE AND SUCCESSION

As years pass, many things change—global markets, business trends, technology—as well as the outlooks and perspectives of various generations. At the Global Family Office Summit, we’ll address best practices for multigenerational wealth transfer, focusing both on changing times and how to keep the values specific to your family office intact.

### RECONNECT SPIRITUALLY

Optional chapel services will be held daily, and spiritual leaders will be available for prayer throughout each day. We will also provide reflection guides and contemplative prayer guides so that you can take the concerns you have, practical and otherwise, to God.

### BALANCING RELATIONAL WHOLENESS WITH FINANCIAL PROSPERITY

At the summit, you’ll learn techniques to strengthen relationships and communicate more effectively between generations with the help of Pepperdine’s Boone Center for the Family. Licensed counselors will be on-site to provide spiritually based guidance, should you choose to take advantage of those services.

### HEALTH AND WELLNESS

When leading families and organizations, it can be difficult to ensure that we are caring well for ourselves while also caring for other members of our team. The summit will offer optional morning stretch times, walks, and hikes, and healthcare practitioners and nutritional counselors will be available for consultation on-site.

### LEGACY AND PHILANTHROPIC PLANNING

Understanding the many philanthropic options available to business families allows them to reduce tax liabilities and support impactful causes. We’ll help you identify and direct your shared family mission toward a future that will serve generations to come through responsible philanthropy.

## Accommodations

Recommendations provided after registration

## Fees and Enrollment

- ▶ **Summit cost per participant**  
*includes meals and program materials*  
**\$12,000 for first family member and spouse**  
**+\$2,000 per each additional family member**
- ▶ **Application Deadline: September 15, 2026**
- ▶ **Fully refundable until August 1, 2026.**  
After August 1, your payment can become fully tax deductible and you can indicate where you’d like to designate the funds to Pepperdine University.

## Who Should Attend?

- ▶ Business-owning families and family offices
- ▶ Those forming or managing a family office
- ▶ Family members engaging in governance or succession roles
- ▶ US and International Pepperdine student business families or alumni

## Schedule and Agenda

October 19–23, 2026

- ▶ Private Markets Roundtable:  
October 19 | 9 AM–4 PM
- ▶ Welcome Dinner and Founder’s Talk:  
October 19 | 5–9 PM
- ▶ October 22 | Zermatt day trip and local activities
- ▶ Closing Brunch Reception:  
October 23 | 10 AM–1 PM

See website for detailed agenda.

## Speakers

- ▶ Family trust and legal experts
- ▶ World-class finance and accounting faculty
- ▶ Philanthropic best practices instructors
- ▶ Jurisdictional tax consultants
- ▶ Wellness and longevity practitioners
- ▶ Family dynamics and relationship coaches, including clinically trained leaders from the Boone Center for the Family

Full list of speakers coming soon! See website for details.

Blonay–Saint-Légier and Lake Geneva



Château d’Hauteville



Matterhorn, Zermatt



# Summary of Session Topics Subject to change.

## GLOBAL ECONOMIC OUTLOOK AND CAPITAL MARKETS

- ▶ Global macroeconomic and geopolitical updates
- ▶ Private markets roundtable discussion
- ▶ Private equity, private credit, hedge funds, and infrastructure investment overview
- ▶ Real estate ownership (multifamily, commercial, industrial, retail)
- ▶ Family balance sheet and understanding asset location and liquidity techniques
- ▶ Financial wellness checklist for all family members

## FAMILY DYNAMICS IN A FAMILY OFFICE

- ▶ Building interpersonal relationships, communication, and trust within the family
- ▶ How do I form or optimize my family office?
- ▶ Sustaining family harmony: introductory course to Boone Center for the Family resources, including the RelateStrong curriculum
- ▶ Family office philosophy: cross-generational unity, family, health, and wealth
- ▶ Modern communication frameworks and handling difficult conversations
- ▶ Best ideas in bridging generations through aligned purpose, experiences, vacations, and meaningful projects

## TRUSTS, PHILANTHROPY, AND THE FUTURE

- ▶ Succession planning and next-generation preparation
- ▶ Structuring trusts and philanthropic vehicles
- ▶ Building a philanthropic toolkit: family foundation, DAF, life insurance, CLAT/CLUT, PPVA, IRA, etc.
- ▶ Priorities for long-term impact/tax optimization and reverse endowment model for increased social impact
- ▶ Rockefeller waterfall, Family Bank concepts, next-generation planning with dynasty trusts
- ▶ Common mistakes to avoid when selling a business
- ▶ Beneficiary designations optimization and mapping workshop

## TAXES, JURISDICTIONS, AND SECURITY

- ▶ Global citizenship and jurisdictional planning—EB-5 and inbound planning
- ▶ Tax summary for family business owners (income, estate, exit, and other taxes)
- ▶ Digital security best practices and stories—online threats, extortion, privacy, reputation, etc.
- ▶ Trust planning techniques in common-law jurisdictions for tax savings, privacy, and protection
- ▶ Physical security best practices and stories—castle doctrine philosophy

## HEALTH AND WELLNESS

- ▶ Homeostasis as a framework for health, wellness, and longevity
- ▶ Preventative medicine and natural best practices in aging and longevity
- ▶ Plants, herbs, vitamins, oils, and minerals 101
- ▶ Harnessing the productivity and enjoyment of technology while minimizing physical fallout
- ▶ Wellness plans for individual family members and special needs support to flourish
- ▶ Resiliency and embodied peace
- ▶ Counseling available
- ▶ Chapel-style services and prayer guides provided

## FOR MORE INFORMATION CONTACT:

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Scan the QR code to access the application form required for participation in this purpose-driven family summit at our international campus in Switzerland. For more information visit the Global Family Office Summit website: [pepperdine.edu/events/global-family-office-summit](https://pepperdine.edu/events/global-family-office-summit)



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