

High Performing Family Offices: Thinking About ‘Me’ as Much as ‘We’

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*“The strength of the team is each individual member.
The strength of each member is the team.”*
- Phil Jackson, All-Time Winningest NBA Coach

Universal complexities

Extraordinary families face a very ordinary challenge when transitioning from single-generational wealth creators to multi-generational legacy builders: figuring out how to devote attention and resources to both the collective “we,” while fully nurturing the equally critical “me,” of each family member and giving them the crucial components of both individual development and collective legacy fulfillment.

Sustaining and growing financial prosperity alongside durable family harmony requires a balance of technical and analytical considerations (wealth transfer) along with relational and emotional factors (values transfer).

Typically, as wealth accumulates and family size increases, the focus of the entire family office system shifts to complex legal, tax, insurance, and investment structures needed to protect, preserve, and grow that wealth, i.e., the collective “we.”

For many multi-generational families, wealth accumulation is not merely about getting richer; it involves the daunting task of supporting numerous family households, each with unique needs, wants, lifestyles, and assets.

With an expanding family unit comes the necessity to embrace diverse perspectives and aspirations, both from bloodline and non-bloodline members – as well as often-overlooked family office executives and their teams.

As this diversity of membership grows and emerges, designing and implementing governance structures become crucial for managing expectations and fostering an environment characterized by open communication, trust, transparency, and effective decision-making to support evolving family dynamics.

However, as more and more resources and attention are devoted to the collective “we,” family offices often overlook the importance of individual (or “me”) development, which is essential for fostering functional, purposeful, and fulfilled family members. These qualities bring more enthusiasm, motivation, and ingenuity to the office, which contributes to a stronger, longer-lasting collective. However, discussing those personal aspirations can be perceived as taboo, or even selfish, in environments focused on managing the collective, “we” family.

So, what happens when the family office continues to build the “we” at the cost of the “me?”

Changing this paradigm is critical. One unhappy or dysfunctional family member can disrupt the entire family system, leading to discord in an otherwise high-performing environment. A careful balance between “we” and “me” is necessary; as one family elder aptly remarked, “Your dysfunction is infecting the family and causing all of us to get sick.” In essence, when one member struggles, it impacts everyone.

High performance through emotional reciprocity: The sixth level framework

Perpetuating the collective family legacy while nurturing each family member’s personal growth and identity development is crucial. If unresolved, this “we” vs. “me” tension risks diminishing individual contributions and hampering the family’s long-term success. It stands to reason, then, that the long-term impact of successfully prioritizing both is massive.

When “we” is also about “me,” the family members of the office are intrinsically motivated to support the legacy. The resentment of being a casualty of the collective is replaced by a desire to support the entire system. Essentially, when the family system creates the conditions for individuals to express and develop their own path, all members become intrinsically motivated to support the legacy. Love and a deep sense of care and

concern for each other are nurtured in this way.

It's not as if family offices intentionally create this division. In fact, enduring family harmony is often mentioned as the top priority of family offices, but that ideal cannot be achieved without following a reliable model that elevates every "me" within the collective "we." Accomplishing that calls for working within a new framework, emphasizing four pillars that not only expand the capabilities of the family office, but also creates a deeper bond and engagement on the part of individual members.

These **four core differentiators**, which are at the root of The Sixth Level, cultivate a fertile environment for individual development and in turn enhance the family's long-term goals.

- **Mutuality is characterized** by emotional reciprocity and connection on a shared journey making room for individual growth paths.
- **Ingenuity is characterized** by the capacity to pursue personal ambition in a way that is unique and untested yet also honors the opportunity the legacy provides.
- **Justness is characterized** by the ability to transcend the natural hierarchies by inviting all voices (from every generation) to shape the future, with the knowledge that today's decisions will impact on those who arrive at the table tomorrow.
- **Intrinsic Motivation** is characterized by the ability to move beyond obligation and compliance, in order to show up authentically because the family office endeavor is mutually rewarding.

In combination, these principles work within and through each other, weaving into every segment of the successful family office. Through mutuality, the family fosters an environment where personal ambition aligns with shared purpose, empowering members to set meaningful goals and see their achievements as part of something greater. Ingenuity is encouraged because it builds self-efficacy. Self-efficacy means an individual believes they can execute a task successfully. It gives family members the confidence to explore new ideas, push boundaries, and persist through challenges.

When fairness, trust, and accountability are upheld, the entire system has a sense of justness. These three pillars work in conjunction to build an environment of intrinsic motivation, where personal growth aligns with family values and fosters mutual respect.

Within this framework, the younger generation is encouraged to pursue ingenuity while carving their own path, as the older generation begins to nurture the next set of leaders with their wisdom, tacit, and explicit knowledge. The older generation can also pursue ingenuity by exploring new interests or old topics and skills they had to push aside.

This framework supports both the family legacy and individual identities through an "Ethic of Care." It promotes collaboration and mutual support, helping to mitigate power struggles and harmonize collective and individual goals. These four core differentiators are the guardrails for enduring trust, goodwill, and harmony that form a foundation of appreciation and support for every branch within the system.

The *Sixth Level* principles hold the potential to unlock a culture where ambition is embraced as an asset, and success becomes a shared experience. Ambition often generates creativity which reinforces the interest in establishing the family office generations before. Then, it becomes about much more than just preserving wealth. It's about creating an environment where every member grows, performs, and leads. And most of all, I feel valued.

Compounding value: Traits of the "Me" that strengthen the legacy of the "We"

While the overarching family goal is a legacy that provides security, opportunity, and choice for future generations, prioritizing personal development through frameworks like The Sixth Level enables family members to feel valued, develop self-efficacy, and contribute meaningfully to the family's mission. Going forward, it is important to adopt models that reduce isolation, alienation, and generational trauma within all generations. Rigid adherence to tradition in the form of precedent may stifle individual identity, leading to disengagement from the family's mission.

In multi-generational families, the interplay between individuality and independence and family reputation and relationship to the community can be both a source of strength and friction. When the value of the individual identity is recognized within the family unit, it allows every member of the collective "we" to thrive and develop a strong sense of self. The key here is to promote the pursuit of one's best self within the larger family system to avoid the trap of feeling diminished by the weight of the family legacy.

The problem is that families are more likely to hold tight to the traditional path of leadership, making decisions based on precedent that stifle creativity and innovation, because "that's the way it's always been done." There is a reason that winning a battle with traditional tactics comes at a "cost" to the many - there are individuals within the group that will be left feeling irreverent, unwanted, and lost within the bigger, broader mission of the family.

Modern, successful family offices recognize that true power lies not in control over wealth, ownership, or influence, but rather in connection and individual responsibility. The long-lasting benefits of this approach are many: self-efficacy (agency) drives family members to believe in their own abilities, while conscientiousness ensures they act with integrity, balancing personal ambition with a commitment to others. This framework becomes a catalyst for individual and collective legacy.

In addition, when individuals feel recognized and valued, they will serve as role models, inspiring others to follow their example and reinforcing the family's mission. This fosters a culture in which personal wins become collective victories, deepening emotional bonds and building resilience. Each member acts as both a leader and a steward, raising the bar for what the family can achieve. The possibilities become, essentially, limitless.

Case study

Samantha, a third-generation member of a prominent Boston family, grew up under the quiet but persistent weight of her family's legacy. While her parents valued independence and encouraged her to make her own decisions, the family's success loomed large, creating the subtle expectation that her life would reflect on the family's reputation.

This freedom came with an underlying message: true independence meant earning her place in the world, often without relying on the advantages her family name provided. The tension between charting her own course and living up to expectations left Samantha feeling that her achievements would always be overshadowed by her privilege.

During a family gathering, a friend remarked, "It must be easy for you, knowing everything's already laid out." The words cut deeply, echoing Samantha's fear that her accomplishments would never be recognized as her own. Determined to reclaim her sense of self, she hired a coach to develop self-efficacy and conscientiousness -

not to meet external expectations, but to align her efforts with personal values and ambitions. That, she knew, would fill the internal gap in building her individuality within a family system.

Her coach helped Samantha redefine success, showing her that excellence wasn't about high performance measured by others, but rather about striving toward personally meaningful goals. Self-efficacy gave her the confidence to trust her abilities and view challenges as opportunities for growth and increased resilience. Samantha began focusing on her own efforts and decisions, rather than constantly trying to prove herself worthy of her family's name.

As Samantha became more self-aware, she began aligning her actions with her individual principles, gaining clarity about the bounds of her conscientiousness and where to place her energy. She became less preoccupied with others' judgments and misperceptions. Instead, she focused on living with integrity, following through commitments, and setting healthy boundaries that strengthened her confidence and well-being. In the process of being accountable to herself, she found that her efforts now naturally aligned with her family's legacy.

Samantha's journey shows that achieving personal excellence within a powerful family legacy isn't about rejecting or conforming to expectations, it's about aligning identity with meaningful effort. Self-efficacy built her confidence to persevere through challenges, while conscientiousness kept her grounded in her values. These traits allowed Samantha to pursue her personal bests along with a lifelong commitment to integrity and growth. By balancing individuality with shared family goals, she transformed the weight of legacy into a foundation for personal fulfillment, and for achieving success on her own terms.

Solutions: How to actually build high-performing family offices through individual development

How does a family office make the shift from a focus on the collective "we" to cultivating the individual "me" to strengthen the entire system. There are four key steps leaders can take:

1. **Focus on cultivating a high performing family office via customization**
Family offices thrive when they prioritize services and relationships tailored to everyone's needs, risks, and ambitions, rather than mandating conformity to

a singular generational vision. By fostering a “multi-individual family office” approach, family members are encouraged to pursue unique paths and contributions, which, in turn, strengthen the family office’s adaptability and resilience. Just as a tree’s network of roots and branches grows stronger through diversity, a family office that values flexibility, customization, and inclusiveness creates a structure where individual achievements and innovations enhance the family’s collective foundation. This approach not only celebrates each person’s ingenuity but also sets a supportive precedent for others to lead in ways true to their own identities.

2. **Focus on creating the conditions for the ‘Me’ to contribute to the ‘We’**

Mandating individuals to conform to the collective “we” thinking and requirements will inevitably backfire and manifest in power struggles. When the family office’s services and relationships are tailored to the strengths of the individuals within the system, a “multi-individual family office” is created. Then, the best of both worlds is achieved: customization and a “not one size fits all” approach that allows for innovation, flexibility, and inclusiveness, while honoring the collective mission to maintain family harmony and connection.

3. **Focus on the enduring family harmony for lasting family legacy**

Sometimes, simply being quiet can make a world of difference. Bringing justness into the family office means inviting all voices to the table. The best ideas for tomorrow are often the ones expressed by those at the table today. A family office that encourages the next generation to express their ideas, vision, needs, and desires naturally embraces the individual. When all generations engage in dialogue, collective wisdom can drive the family forward.

4. **Focus on coaching individuals to reach personal best for the collective best**

Individuals whose identity is shaped by self-efficacy and conscientiousness have the capacity and motivation to pursue personal bests in alignment within the larger family system. When those individuals feel valued, heard, and respected, they will set ambitious goals, and persevere through challenges, which leads to greater self-confidence and resilience. When everyone within the collective

unit of the family office is strengthened, the entire legacy is transformed.

Conclusion: Compounding growth and strength of the family office in perpetuity

The four core differentiators of mutuality, ingenuity, justness, and intrinsic motivation in The Sixth Level create conditions where individual growth honors the family mission. It gives every individual ownership in the future of the family office. That is the key to building a thriving legacy - one where personal ambition fuels unity, and unity sustains ambition across generations.

Families that cultivate self-efficacy and conscientiousness unlock the secret to compounded growth, where every achievement builds on the success of those who came before and creates a legacy in perpetuity. Personal ambition and collective legacy are no longer seen as competing forces - they are interconnected pursuits. Using this framework to create conditions that foster a supportive environment where individuals develop a healthy *Self-in-Relation* identity, promotes mutuality and emotional reciprocity.

This enhances individual purpose while reinforcing the family’s mission, building a dynamic ecosystem that balances continuity with adaptability. By aligning individual ambitions with family goals, each member is empowered to contribute, creating a legacy that is enduring, adaptable, and beneficial to all generations.

The ‘We,’ with its focus on wealth transfer, is then replaced by an emphasis on the ‘Me’ within the ‘We,’ a subtle but powerful shift that refocuses the family office on a values transfer from one generation to the next. This approach goes far beyond the nitty-gritty of taxes, insurance, and investments and builds an actual legacy that ensuing generations are incentivized to continue because they have become an integral part of the entire family system.

The roots and branches are then just as vital as the trunk of the tree, which lays the groundwork for unlimited growth. Together.