



IDEAL ADVISORY FOR FOUNDER-LED & MULTI-GENERATION FAMILIES

Family Council Advisory

Structure, governance and clarity for families whose wealth has outgrown informal decision-making — without the cost of a full Family Office.

A GUIDE FOR FAMILIES AT THE INFLECTION POINT

You've built something worth protecting. Now it needs structure.

You're a founder-led or second-generation family with real, growing complexity — multiple entities, trusts and investment structures. The business has outgrown the kitchen-table conversation. Succession is on the horizon, and keeping everyone aligned is harder than it used to be. You don't need — or want — the cost and overhead of a full Family Office. You need governance, structure and a trusted independent facilitator in the room.



THE PROFILE, AT A GLANCE

\$5M – \$50M+

NET FAMILY WEALTH

2 – 4+

GENERATIONS INVOLVED

Multi-entity

TRUST & STRUCTURE COMPLEXITY

50+

FOUNDER / DECISION-MAKER AGE

Melbourne-based

FOUNDER OR 2ND-GEN FAMILY

The pressures that build behind the scenes

Four categories of strain we see consistently in families at this stage — often all at once.



Governance

- No clear decision-making framework
- Informal arrangements no longer sufficient
- Active & passive members misaligned
- No forum for structured family decisions



Succession

- Succession timing unclear or avoided
- Next generation not prepared or interested
- Founder reluctant to step back
- No transition plan for business or wealth



Structure & Tax

- Multiple entities with no oversight hub
- Advisers uncoordinated across disciplines
- Complex trust & tax planning not integrated
- Capital allocation decisions contested



Family Dynamics

- Fear of conflict and avoiding hard decisions
- Misalignment between family members
- Transparency concerns eroding trust
- No mechanism to depersonalise disputes

Structure and discipline, without Family Office cost

Traditional Compliance	FAMILY COUNCIL ADVISORY	Full Family Office
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We sit deliberately in the middle — governance-first, cost-effective, and built to scale as your family's complexity grows.

Fees agreed upfront, no surprises. Every engagement begins with a clear scope and cost before any work starts.



01 ESTABLISHMENT

Foundation, Charter
& Council design

A structured 3–6 month phase to build the governance framework, agree the Family Charter, and establish the Council.



02 ONGOING

Quarterly / annual
facilitation & oversight

Regular, independently-facilitated sessions that keep decision-making disciplined and the family aligned.



03 EVENT-BASED

Transaction, succession
& dispute support

On-call support for the moments that matter most — liquidity events, succession, and resolving disagreement.



An independent facilitator — not another product-seller

- We facilitate — the family retains every decision right
- We earn trust slowly; this is a long-term family relationship
- We integrate across your legal, tax, wealth and business advisers
- We lead with governance and alignment, never compliance alone



“Your advisers are good. Is there a room where they all report?”

Meet the partners behind Family Council Advisory — affinity.com.au/about-us

WHAT FAMILIES TELL US THEY WANT

- ✓ Clear governance structure for family decisions
- ✓ A trusted, independent facilitator — not a product-pusher
- ✓ Succession planning with clarity & family buy-in
- ✓ Coordinated oversight of tax, structure & estate planning
- ✓ A Family Charter to align values, roles & expectations
- ✓ Structure & discipline without Full Family Office cost



Is Family Council Advisory right for your family?



This is likely a strong fit

- Family wealth of \$5M+, held across multiple entities
- Genuine appetite for structured governance
- Openness to bringing other family members into decisions
- Wants strategic advisory, not compliance alone
- 2–5 years out from a planned succession or exit event
- Currently juggling multiple, uncoordinated advisers



Probably not the right fit

- Family wealth under \$4.5M, or a single simple entity
- No genuine appetite for structured governance
- Family conflict too entrenched — legal intervention needed
- Seeking investment management rather than governance
- Founder unwilling to involve other family members
- Wants compliance only, resistant to strategic advisory



LET'S START THE CONVERSATION

Your family has built something worth governing well.

If informal decision-making no longer fits your family's complexity, we'd welcome the chance to talk. A first conversation is about understanding your family's situation — not a sales pitch.

AFFINITY ADVISORY

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Meet our partners: affinity.com.au/about-us

