



FOR FAMILY OFFICES AND THE FAMILIES THEY SERVE

Leadership, governance and succession, built to last.

Senior fractional executives, specialist teams and governance design for families running wealth and operating businesses. An exit-oriented model with a defined end point, then leadership handed back.

WHERE FAMILIES ARE EXPOSED

Privacy and exposure

Wealth makes a family visible. Staff, advisors and data are where information leaks.

Succession, unplanned

The estate plan names heirs, but no one is named to lead the family or its businesses next.

Advisor silos

Experts in every lane, with no one looking across the lanes or benchmarking their work.

Struggling companies

Portfolio businesses that are underperforming and need seasoned leadership now.

WHAT WE DELIVER

Protection and discretion. NDA from day one. Your people, data, advisors and decisions stay private, with discreet handling of every introduction and engagement.

Governance design. Councils, decision rights and benchmarking of your advisors.

Operations specialists. Supply chain, project management, AI and systems engineers.

Fractional executives and recruiting. CFOs, COOs, CIOs and CEOs who have led through multiple exits and worked with PE and family offices, plus family office recruiters to place the permanent hire.

Interim leadership. Seasoned executives stepping in while you find the permanent hire.

Next-generation development. Preparing heirs and rising leaders to lead.

ASCENT FRAMEWORK • Base Camp • Strategy • Capability • Execution • Navigate • Transform

Assess

Install

Hand off

Peak is not an ongoing family office. We build it and hand leadership back.

Privé by Peak

ONE LIFE. EXCEPTIONALLY HANDLED.

A private office for the family, led by one Attaché. Not a concierge. Not an assistant. Open by introduction.

PERFORM

Optimization, longevity, nutrition and human performance. Preparation, councils and coaching. Private events free of solicitation.

NAVIGATE

Health and medical navigation. Family and life support. Discreet affairs, governance, succession and transitions. Private talent, personally selected.

PROTECT

Privacy across personal, financial and digital identity. Reputation. Security for person, home and travel. Stewardship of homes, collections and exceptional assets.

THE BENCH BEHIND YOUR FAMILY

Family office team

UHNW family experience

Family office recruiters

AI, supply chain and project teams

"Colleen, you and your team asked my family questions I never expected to answer. They were private, invasive, and exactly what we needed to make better decisions. Thank you for slowing down and caring."

FOUNDER, DURING FAMILY OFFICE SETUP

We deliver solutions.

Peak Fractional Leadership & Advisory Group · Privé by Peak

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