

Packed with insights and practical guidance, these recommended books cover a broad range of topics that address the needs and interests of high-net-worth families and their advisors. The topics include: (1) Family Journey and Family Relations (2) Family Learning (3) Operating Businesses (4) Family Philanthropy (5) Enterprise Governance (6) Investment Management (7) Wealth Management (8) Lifestyle Services (9) Human Capital (10) Macro Trends. The book titles are listed in chronological order, beginning with the most recent titles appearing at the top for each topic category.

▶ Family Journey and Family Relations

[Engaged Healthy, Wealthy & Wise](#)

Coventry Edwards-Pitt, 2023, *adapted description from Ballentine Partners and Amazon.com*

At a certain level of wealth, money makes parenting harder, not easier. *Raised Healthy, Wealthy & Wise* breaks new ground in the field of raising children amid wealth by hearing from the success stories: real-life children with wealth now grown into happy and productive adults. Through the voice of the inheritors and their significant others, lessons are shared on how they have navigated love and family wealth and forged their own joint path to lead fulfilling lives.

[The Quest for Legitimacy: How Children of Prominent Families Discover Their Unique Place in the World](#)

Jamie Weiner, 2022, *adapted description from Amazon.com*

Relying on qualitative research conducted on wealthy families, Dr. James Weiner delivers a unique and eye-opening discussion of the Rising Generation's quest for self-determination in the shadow of a larger-than-life family. This is an essential read for anyone navigating the complex dynamics of accomplished families.

[We Need to Talk: A Memoir About Wealth](#)

Jennifer Risher, 2020, *adapted description from Amazon.com*

When Jennifer Risher joined Microsoft in 1991, she met her husband, and with him became an extra-lucky beneficiary of the dot-com boom. By their early thirties, they had tens of millions of dollars. Jennifer's thought-provoking, personal story includes the voices of others in her demographic and explores the hidden impact of wealth on identity, relationships, and sense of place in the world. At a time when money is still a taboo subject, Jennifer's memoir, *We Need to Talk*, is a catalyst for conversation that demystifies wealth and inspires us to connect. In a discussion with Mindy Earley at the [2021 FOX Family Forum](#), Jennifer shares more thoughts on the hidden impact of wealth.

[Bridging Generations: Transitioning Family Wealth and Values for a Sustainable Legacy](#)

Roy O. Williams and Amy A. Castoro, 2017, *adapted description from Amazon.com*

From years of field experience working with families and their trusted advisors, Roy O. Williams and Amy A. Castoro take the conversation on preparing heirs to a new level of understanding and action. This book provides the insights, strategies, and compelling stories on how family wealth and family values can be successfully passed on from one generation to the next with the family unity intact.

[Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times](#)

Mark Haynes Daniell and Sara Hamilton, 2010, *adapted description from Amazon.com*

Family legacy and leadership are important subjects that have a great influence on the future of the family as a whole and a profound impact on the lives of its individual members. Although each family has its own history and unique destiny, this book will bring to all families a deeper understanding of their legacies and a practical approach to their leadership. As a result, leaders, members, and advisors alike will be able to manage comfortably both the continuity and change that families require.

▶ Family Learning

[The Opposite of Spoiled: Raising Kids Who Are Grounded, Generous, and Smart About Money](#)

Ron Lieber, 2015, *adapted description from Amazon.com*

Grounded in real-world experience and stories from families with a range of incomes, *The Opposite of spoiled* is both a practical guidebook and a values-based philosophy. The book delivers a taboo-shattering manifesto that explains how talking openly to children about money can help parents raise modest, patient, grounded young adults who are financially wise beyond their years.

[Raising Financially Fit Kids](#)

Joline Godfrey, 2013, *adapted description from Amazon.com*

At the heart of the book is a developmental map covering 10 specific money skills children can master before the age of 18 to become financially secure adults. More than just a money book, *Raising Financially Fit Kids* will help parents send kids into the world as balanced young adults who exercise good judgment, practice responsible habits, and live financially stable lives.

▶ Operating Businesses

[Your Business, Your Family, Your Legacy: Building a Multigenerational Family Business That Lasts](#)

George A. Isaac, 2020, *adapted description from Amazon.com*

Whether you are an experienced family business or family office executive, board member, owner, or next-generation family member, George Isaac has written the definitive handbook on the challenges of managing a multi-generational family enterprise. His book discusses best practices for all the key issues associated with family businesses.

[The Infinite Game](#)

Simon Sinek, 2019, *adapted description from Amazon.com*

In this revelatory book, Simon Sinek offers a framework for leading with an infinite mindset, where leaders commit to a vision of a future shaped from five essential practices: advancing a Just Cause; building trusting teams; studying your worthy rivals; preparing for existential flexibility; and demonstrating the courage to lead that will leave their organizations in a better condition than they found them.

[Measure What Matters](#)

John Doerr, 2018, *adapted description from Amazon.com*

In the goal-setting system of Objectives and Key Results (OKRs), objectives define what you seek to achieve, and key results are how those top-priority goals will be attained with specific, measurable actions within a set time frame. The benefits of OKRs are profound, including keeping employees on track and linking objectives across silos to unify and strengthen the entire company, enhancing workplace satisfaction, and boosting retention. Doerr shares a broad range of first-person, behind-the-scenes case studies to demonstrate the focus, agility, and explosive growth that OKRs have spurred at so many great organizations.

▶ **Family Philanthropy**

[Family Philanthropy Navigator: The Inspirational Guide for Philanthropic Families on Their Giving Journey](#)

Peter Vogel, Etienne Eichenberger, Malgorzata Kurak, 2020, *adapted description from Amazon.com*

Philanthropy is an important and highly rewarding way for individuals and families to make a difference in a rapidly changing world. Like the world around us, philanthropy is changing and transforming, and philanthropic families are seeking out new ways to ensure that their giving is meaningful and impactful. *The Family Philanthropy Navigator* offers an easy-to-use, step-by-step inspirational guide for new and existing philanthropic families to initiate or enhance their journey in giving.

[Give Smart: Philanthropy that Gets Results](#)

Thomas J. Tierney and Joel L. Fleishman, 2011, *adapted description from Amazon.com*

In the first half of the twenty-first century, giving to family and community foundations alone will be ten times in today's dollars what it was throughout the entire twentieth century. Yet despite tremendous innovation in the social sector, philanthropy's natural state is under-performance. This book provides practical guidance for donors to get the most impact from their giving.

▶ **Enterprise Governance**

[Borrowed from Your Grandchildren: The Evolution of 100-Year Family Enterprises](#)

Dennis T. Jaffe, 2020, *adapted description from Amazon.com*

While creating wealth is a wonderful achievement, business families are also concerned with how their wealth is used to support their values, the lives of their children, and the well-being of the community. Over several generations, families who are successful in growing their wealth have been able to reinvent themselves and their business in the face of significant environmental transformations and internal differences cause by family dynamics. *Borrowed from my Grandchildren* is a fascinating look at how large, long-lasting business families succeed across generations.

[Family Trusts: A Guide for Beneficiaries, Trustees, Trust Protectors, and Trust Creators](#)

Hartley Goldstone, James E. Hughes, Jr., and Keith Whitaker, 2015, *adapted description from Amazon.com*

Marrying the practical and emotional aspects of family wealth, this book provides a hands-on primer that focuses on fostering positive relationships and structuring the trust appropriately for the situation and the people involved. Written by a team of experts in family wealth, this information is becoming increasingly crucial to the successful execution of a trust. From the book, you will learn what type of person makes the best trustee, how to be an excellent beneficiary, and the technical aspects that help you build a better trust from the very beginning.

▶ Investment Management

[Advanced Introduction to Private Equity](#)

Paul A. Gompers and Steven N. Kaplan, 2022, *adapted description from Amazon.com*

Integrating insights from academic research with examples to derive practical recommendations, *Advanced Introduction* provides an illustrative guide to private equity. Paul Gompers and Steven Kaplan begin by reviewing the history of private equity then exploring the evidence on performance of private equity investments at both the portfolio company level and fund level, documenting the creation of economic value. The book then presents a set of actionable frameworks for driving value creation in private equity investments. It concludes by examining how private equity investors raise funds and how they successfully manage their private equity firms.

[Principles for Navigating Big Debt Crises](#)

Ray Dalio, 2022, *adapted description from Amazon.com*

Ray Dalio believes that most everything happens repeatedly through time so that by studying patterns one can understand the cause-effect relationships behind events and develop principles for dealing with them well. He does just that for big debt crises and shares his template in the hopes of reducing the chances of big debt crises happening and helping them be better managed in the future.

[The Taxable Investor's Manifesto: Wealth Management Strategies to Last a Lifetime](#)

Stuart E. Lucas, 2020, *adapted description from Amazon.com*

With the deep industry knowledge of a seasoned practitioner, *The Taxable Investors Manifesto* sensibly folds tax incentives into investment strategy in ways that can add profound value over a lifetime to actual results. It includes guidance on how to keep a greater percentage of your profits with a higher probability of success and less effort; why it is important to manage the intersection of investment, tax, and estate planning; and how to compete for better long-term investment returns against tax-exempt investors.

[The Bitcoin Standard: The Decentralized Alternative to Central Banking](#)

Saifedean Ammous, 2018, *adapted description from Amazon.com*

When a pseudonymous programmer introduced “a new electronic cash system that’s fully peer-to-peer, with no trusted third party” to a small online mailing list in 2008, very few paid attention. Ten years later, and against all odds, this upstart autonomous decentralized software offers an unstoppable and globally-accessible hard money alternative to modern central banks. The *Bitcoin Standard* analyzes the historical context to the rise of Bitcoin, the economic properties that have allowed it to grow quickly, and its likely economic, political, and social implications.

[The Complete Direct Investing Handbook: A Guide for Family Offices, Qualified Purchasers, and Accredited Investors](#)

Kirby Rosplock, PhD, 2017, *adapted description from Amazon.com*

This specialized guide and resource take you through pre- and post-considerations of direct investing. Several chapters are contributed by leading practitioners in the field who share their insights and experiences of using the direct investing strategy. Relevant case examples and research bring the material to life and shed light on the realities of direct investing globally. Additionally, you can discover a practitioner’s lens to sourcing, screening, and ultimately deploying capital into direct investments individually or as a co-investor. Learn how to create a direct investment thesis and to strategically execute, monitor, and exit a direct investment.

▶ Wealth Management

[Wealth of Wisdom: Top Practices for Wealthy Families and Their Advisors](#)

Tom McCullough and Keith Whitaker, 2022, *adapted description from Amazon.com*

In *Top Practices for Wealthy Families and Their Advisors*, accomplished family wealth experts Tom McCullough and Keith Whitaker deliver a comprehensive collection of practical activities that members of wealthy families can undertake to ensure their continued success and development. This book provides top practices and tools on how to identify the factors that matter most when it comes to retaining and growing family wealth; invest wisely; raise the next generation; share their decision making through a prudent process; and incorporate charitable giving into an overall wealth strategy. It’s also an indispensable resource for managers of family trusts seeking to protect and advise their clients.

[Winning on Purpose: The Unbeatable Strategy of Loving Customers](#)

Fred Reichheld, Darci Darnell, and Maureen Burns, 2021, *adapted description from Amazon.com*

Few management ideas have spread so far and wide as the Net Promoter System (NPS). Since its conception decades ago by customer loyalty guru Fred Reichheld, thousands of companies around the world have adopted it. Taking the NPS to another level, Reichheld demonstrates that the primary purpose of a business should be to enrich the lives of its customers. With that focus at the core of this book, Reichheld shows through compelling examples, keen insights, and moving personal stories how companies with superior NPS consistently deliver higher returns to shareholders across a wide array of industries.

[The Psychology of Money: Timeless Lessons on Wealth, Greed, and Happiness](#)

Morgan Housel, 2020, *adapted description from Amazon.com*

Doing well with money is not necessarily about what you know. It is about how you behave. And in the real world, people do not make financial decisions on a spreadsheet. They make them at the dinner table or in a meeting room, where personal history, their own unique view of the world, ego, pride, marketing, and odd incentives are scrambled together. In *The Psychology of Money*, award-winning author Morgan Housel shares 19 short stories exploring the strange ways people think about money and teaches you how to make better sense of one of life's most important topics.

[Wealth of Wisdom: The Top 50 Questions Wealthy Families Ask](#)

Tom McCullough and Keith Whitaker, 2018, *adapted description from Amazon.com*

Managing significant family wealth is a complex affair, offering both opportunities and challenges. And those challenges have been on the rise with unprecedented transfer of wealth across the generations, shifting definitions of family, globalization, evolving family dynamics, increasing longevity, and massive wealth creation. By compiling the 50 most common questions and answers framed around nine categories—including investing wisely, raising the rising generation, and making shared decisions—this book is a practical, on-the-ground, how-to guide that will answer the key questions that every family of wealth wrestles with on a regular basis.

▶ Lifestyle Services

[Saving the Family Cottage: A Guide to Succession Planning for Your Cottage, Cabin, Camp, or Vacation Home](#)

Stuart J. Hollander, Rose Hollander, and David S. Fry, 2021, *adapted description from Amazon.com*

Shared ownership of vacation property—especially when the co-owners are family members—can be fraught with problems. The idyllic dream of a cottage getaway can be shattered when co-owners' emotions, financial concerns, and opinions on how the property should be used come into play. Fortunately, a solid plan that dictates how the property will be owned and managed can prevent squabbles over the family cottage.

[How to Find, Hire, and Keep the Right Domestic Professionals:](#)

[The Household Employer's Guide to Hiring Great Employees Who Will Stay for Years](#)

Aleksandra Kardwell, 2019, *adapted description from Amazon.com*

Over the years, Aleksandra Kardwell has learned a great deal about the needs of household employers, gaining an in-depth understanding of what works in domestic hiring. In *How to Find, Hire and Keep the Right Domestic Professionals*, she shares her experience, insights from thought leaders in the staffing field, and findings from a key employment research. This practical, hands-on book is filled with timely information and actionable advice to help you identify, hire, and keep the right people for your unique needs and preferences. Follow the advice in this guide and transform your rate of success in household employee selection.

[Passing It On: The Inheritance and Use of Summer Houses and Family Cottages + Workbook](#)

Judith Huggins-Balfe and Ken Huggins, 2015, *adapted description from Amazon.com*

Passing It On focuses on the sociological and family-dynamics involved in sharing real property rather than merely on the legal issues of estate reduction. It includes extensive quotes from over 100 summer-house heirs, about how they have managed to keep the property in the family over generations. Included is the companion guide: *How to Pass It On*, a workbook to help put into effect the practical aspects of Informal and Formal Operating Agreements, Practices & Policies, and other necessary agreements.

▶ Human Capital

[The Ideal Team Player: How to Recognize and Cultivate the Three Essential Virtues](#)

Patrick Lencioni, 2016, *adapted description from Amazon.com*

In *The Ideal Team Player*, Patrick Lencioni tells the story of Jeff Shanley, a leader desperate to save his uncle's company by restoring its cultural commitment to teamwork. Jeff must crack the code on the virtues that real team players possess, and then build a culture of hiring and development around those virtues. Beyond the fable, Lencioni presents a practical framework and actionable tools for identifying, hiring, and developing ideal team players. Whether you are a leader trying to create a culture around teamwork, a staffing professional looking to hire real team players, or a team player wanting to improve yourself, this book will prove to be as useful as it is compelling.

[Blindspot, Hidden Biases of Good People](#)

Mahzarin R. Banaji and Anthony G. Greenwald, 2016, *adapted description from Amazon.com*

Leading psychologists Mahzarin R. Banaji and Anthony G. Greenwald explore and reveal hidden biases based on their experience with the Implicit Association Test, a method that has revolutionized the way scientists learn about the human mind and that gives us a glimpse into what lies within the metaphoric blindspot. The title's "good people" are those of us who strive to align our behavior with our intentions. The aim of *Blindspot* is to explain the science in plain enough language to help well-intentioned people achieve that alignment. By gaining awareness, we can adapt beliefs and behavior and "outsmart the machine" in our heads so we can be fairer to those around us. Venturing into this book is an invitation to understand our own minds.

▶ Macro Trends

[Making the Numbers Count](#)

Chip Heath and Karla Starr, 2022, *adapted description from Amazon.com*

Whether you're interested in global problems like climate change, running a tech firm or a farm, or just explaining how many Cokes you'd have to drink if you burned calories like a hummingbird, this book will help translate the numbers that animate our world—allowing us to bring more data, more naturally, into decisions in our schools, our workplaces, and our society. In *Making the Numbers Count*, Chip Heath and Karla Starr outline specific principles that reveal how to translate a number into our brain's language.

[Principles for Dealing with the Changing World Order: Why Nations Succeed and Fail](#)

Ray Dalio, 2021, *adapted description from Amazon.com*

In this addition to Ray Dalio's Principles series, Ray brings readers along for his study of the major empires—including the Dutch, the British, and the American—putting into perspective the “Big Cycle” that has driven the successes and failures of all the world’s major countries throughout history. He reveals the timeless and universal forces behind these shifts and uses them to look into the future, offering practical principles for positioning oneself for what’s ahead.

[The Price of Tomorrow: Why Deflation is the Key to an Abundant Future](#)

Jeff Booth, 2020, *adapted description from Amazon.com*

Technological advances are happening at a rate faster than our ability to understand them, and in a world that moves faster than we can imagine, we cannot afford to stand still. In this extraordinary contrarian book, Jeff Booth, a leading mind and CEO in e-commerce and technology for 20 years, details the technological and economic realities shaping our present and our future, and the choices we face as we go forward—a potentially alarming, but deeply hopeful situation.

If there is a book you would like to recommend, please let us know by sending FOX an email at info@familyoffice.com. For more insights and thought leadership on topics devoted to the issues of most concern to the FOX community, please visit the online [FOX Trends & Insights Library](#).