How Family Offices Can Protect Wealth and Legacy

Embracing Mediation & Collaborative Practice for Families

The greatest threat to preserving family wealth and legacy is not just taxes, investment performance, or market volatility. It is unresolved family conflict.

For decades, family mediation has been associated with divorce. It is viewed as a process to help separating couples facilitate settlements and move forward with their lives.

But for family offices, wealth advisors, private banks, insurance companies, and estate professionals, a more strategic development is now available. As trillions of dollars transfer between generations over the next two decades, families are discovering that even the best estate plans can unravel when communication breaks down. Trust disputes, probate litigation, inheritance disagreements, succession planning, sibling rivalries, blended families, and differing expectations can quickly escalate into costly legal battles that can permanently damage family relationships.

Increasingly, leading family offices around the world are recognizing that mediation and collaborative practice are not only dispute-resolution tools—but also wealth preservation strategies. To understand strategies that lawyers and mediators can use to protect legacy and ensure family harmony, Nicholas Jacob, Partner, Forsters LLP, and I created a 45-minute podcast which provides guidelines and cases to support professionals working with family offices. Click to Listen

The Cooley Family Office believes that preserving relationships is just as important as preserving assets. While lawyers draft documents and financial advisors manage investments, families also need trusted professionals who understand how to navigate the emotional complexities that often accompany generational wealth.

To help meet this growing need, the Cooley Family Office is organizing Asia's first dedicated "Family Office Mediation and Collaborative Practice (FOMCP) Training", supported by the AALCO Hong Kong Regional Arbitration Centre. The training focuses on mediation and collaborative practice for trusts, estates, probate, and family wealth transitions.

This advanced training is being offered in Hong Kong on **26-29 September 2026**, to lawyers, financial neutrals, mediators, family counselors, and other family office professionals. It introduces a structured, interdisciplinary, confidential approach to resolving sensitive family estate and wealth-related disputes early—before escalation into litigation, value destruction, or family estrangement.

Ann Cooley, CEO, Cooley Family Office
and Nicholas Jacob, Partner, Forsters LLP

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This is our International Interdisciplinary training team:

Something to Think About and Plan For

According to a McKinsey study, Asia is entering one of the most significant intergenerational wealth transfers in its history, with an estimated US $5.8 trillion in family wealth expected to change hands across Asia-Pacific by 2030, making succession planning, governance, and dispute resolution critical priorities for families, family offices, and their advisers.

The true legacy of a family and family office is measured not only by the wealth it protects — but also by the relationships it helps to preserve.

We welcome professionals from across Hong Kong and the Asia-Pacific region as we begin a new chapter in Family Office Mediation and Collaboration Practice.

Warmest regards,

Ann Cooley
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Cooley Family Office

The mission of Pacific Hawk is to protect love and wealth across generations.

Pacific Hawk was founded in 1997 by Ann Cooley. Pacific Hawk maintains long-term relationships with clients by offering bespoke investment and wealth protection solutions, including Pacific Hawk Global Fund OFC, investment advisory, family/business mediation, and collaboration services. With Ann's unique qualifications as a JD, CFP, Family Mediator, and Collaborative Practice negotiator, she has helped families in New York, London, and Hong Kong including the Rothschild, Rockefeller, and Cadbury families.

Please visit our website www.pacifichawk.com or [Linkedin]()
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