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May. 25, 2022

That national audit, tax and consulting services firm RSM US LLP has joined forces with Cornell University's SC Johnson College of Business Smith Family Business Initiative to develop the RSM Family Office Institute. The RSM Family Office Institute enhances RSM's ability to serve the unique needs of family office clients.

The RSM Family Office Institute was created and will be led by Tony Wood, national family office leader with RSM US LLP, and Karen Costa, national family office advisory center leader with RSM US LLP, with Cornell University expert faculty. The program will be taught by Cornell faculty and Cornell Family Business Fellows.

The RSM Family Office Institute will begin in June 2022 and will help enable 35 family office specialists to communicate the business, family dynamics/conflict, financial, risk, tax and other issues family offices face. RSM's family office clients will benefit from the firm's tailored ideas, recommendations and solutions resulting from the RSM Family Office Institute.

"RSM's vision is to be the first-choice advisor to clients, meeting them where they are and helping them position themselves for the future," said [Joe Adams](#), managing partner and CEO with RSM US LLP. "The RSM Family Office Institute equips our firm to further achieve this vision through an intensive business, family dynamics and strategic planning curriculum focused on the particular needs and trends that impact the family offices we serve. Our family office specialists will draw on this leading program to bring fresh perspectives and issues-based knowledge to our family office clients as they navigate the rapidly changing business, technological

and management environments that are transforming how family offices function

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“We designed the program curriculum to be on par with what top graduate programs are teaching about the transformative role of family offices to manage the business, personal and family affairs of wealthy families,” said Wood. “This program is designed to bring immediate practical applications for RSM and the firm’s family office clients.”

“There is a sense of urgency surrounding transformation of the family office,” said Costa. “We look forward to training a talented group of family office specialists to produce timely and actionable insights for our clients.”

“We are proud to join RSM on this innovative executive development program to advance current and future leaders to confidently grow their engagement with family offices,” said Daniel Van Der Vliet, the John and Dyan Smith Executive Director of the Smith Family Business Initiative at Cornell University. “This program will equip participants with practical, real-world tools, connect them with other professionals and prepare them to successfully develop relationships and collaborations with family offices and their key constituents.”

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