

# 'Is a Family Office Right for You?' Family Business Workshop Set for Calif. State University, Fullerton, August 13

ANAHEIM, CALIFORNIA, UNITED STATES, August 8, 2024 /EINPresswire.com/ -- Family Enterprise USA's Pat Soldano, Sandy Juranich, Single Family Office Manager, and Whit Batchelor, Executive at Multi-family office Whittier Trust, Discuss the Pros/Cons of Different Family Office Approaches



California State University, Fullerton's (CSUF) Center for Family Business is holding a workshop on the question, "Is a Family Office Right for You?"

[The event, held August 13 in the university's Scott O'Brien Innovation](#) Center from 7:30AM to 10AM, features a panel discussion led by Pat Soldano, President, Policy and Taxation Group and Family Enterprise USA. Other panelists are single-family office leader Sandy Juranich and Whit Batchelor, Senior Vice President and Client Advisor at Whittier Trust, a Pasadena-based multi-family office.

The CSUF workshop is hosted by Tim Schultz, Director, CSUF's Center for Family Business.

The two-hour discussion is focused on the topic of working with family offices, the state of the family office business, and the benefits of a single family office versus a multi-family office.

During the workshop attendees will learn, "What is a family office?" and will understand the different models of family offices, and the array of services offered. The panel's conversation will help answer such questions as: "Do you need a family office?" If so, "What model will work best?"

"Understanding the advantages and disadvantages of a family office structure is the first issue family business leaders and successful individuals need to understand before they hire a family office to manage their affairs," said Soldano, who has worked in the Family Office industry for 30 years.

[During the discussion she and the panel will explain family office models](#), services, and then lead the discussion on the advantages and disadvantages of each model.

“Our most recent survey shows thirty-three percent of family businesses work with family offices,” Soldano said. “But the Next Generation of leaders look at family office services very differently,” she said. “This will change the industry dramatically.”

Family businesses are the largest private employers in the country, accounting for 83.3 million jobs, or 59 percent of the country’s private workforce, according to research. America’s family-owned businesses contribute \$7.7 trillion annually to the U.S. gross domestic product.

Panel member Sandy Juranich, CPA, is a family office professional, having been part of a multi-family office for 20 years. Currently, Juranich is financial planning manager for a large Southern California single-family office, overseeing family personal finances, business interests, coordinating accounting, taxes, estate planning, investments, risk management, and personal business interests, using both internal and external resources.

The other panel member, Whit Batchelor, is a Senior Vice President and Client Advisor at Whittier Trust’s Orange County office, where he manages the complex needs of affluent individuals and families in the structure of a multi-family office.

#### About the CSUF Center for Family Business

The CSUF Center for Family Business, established in 1993, is dedicated to supporting family businesses through education, resources, and networking. With a mission to create transformative environments and opportunities, the Center plays a pivotal role in promoting the success and sustainability of family businesses in Orange County and beyond. The Center continues to make a profound impact on the communities and businesses it serves.

#### About Policy and Taxation Group

Policy and Taxation Group is the voice of successful individuals, family offices, and family businesses in Washington, D.C., focused exclusively on the critical tax and economic issues that impact them. In addition, it is the leading information, education and advocacy organization working for the reduction and ultimate elimination of estate, gift, and generation skipping transfer taxes, and other taxes that punish hard work and success. Policy and Taxation Group is a 501(c)(4) organization comprised solely of families directly or indirectly impacted by these harmful taxes and regulations. For more information and support go to [policyandtaxationgroup.com](http://policyandtaxationgroup.com)

#### About Family Enterprise USA

Family Enterprise USA promotes multi-generational family business creation, growth, viability, and sustainability by advocating for family businesses and their lifetime of savings with Congress in Washington DC. FEUSA represents and celebrates all sizes, professions and industries of family-owned enterprises and multi-generational employers. FEUSA is a 501.C3 organization.

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