



Universität
Zürich^{UZH}

Continuing Education



Family Governance and Family Office Excellence

Certificate of Advanced Studies CAS
Faculty of Law of the University of Zurich
Europa Institut at the University of Zurich



CAS in Family Governance and Family Office Excellence

15 ECTS Credits

The program is designed for professionals, executives, and family members of family businesses and wealthy families. This part-time university program aims to provide an in-depth understanding of the four key governance areas relevant to family enterprises and wealthy families: Family, Ownership, Business, and Wealth Governance.

Core topics include: family constitution, ownership strategy, ownership structures, legal frameworks and succession planning (shareholders agreement, inheritance contracts), family dynamics, communication, taxes, board of directors, leadership succession, business evaluation, Exit (IPO, sale), wealth organization (family offices), real estate, philanthropy and art.



This program is organized and run by the Europa Institut at the University of Zurich on behalf of the Faculty of Law of the University of Zurich.

Aim of the course

The CAS program prepares professionals, advisors, and family members for the complex task of advising and supporting family businesses and wealthy families. Participants gain comprehensive expertise and practical skills to develop and implement professional strategies across the four governance dimensions – Family, Ownership, Business, and Wealth Governance. All content is taught through real-life case studies to foster hands-on advisory competence in addition to theoretical knowledge.

Target group

The CAS is aimed at individuals working with family firms and high-net-worth families in governance-related areas – including banking, family offices, wealth management, fiduciary services, and legal advisory – who wish to deepen their expertise and stay abreast of current developments. It is also suited for professionals seeking specialization in this field with foundational knowledge, as well as family members actively involved in governance

Key Data

Module 1: Fundamentals of Family Governance: Family and Ownership, Family Constitution and Strategy

After an introductory overview, this module explores the Family and Ownership Governance dimensions. Key instruments include: ownership and family strategies, family constitutions, conflict resolution and communication processes, and various legal structures (corporations, foundations, trusts, marital and inheritance tools).

Module 2: Specific Business Topics

This module focuses on Business Governance, covering instruments such as corporate strategy, board governance, compensation systems, shareholder agreements, leadership and succession, business valuation, internal and external (crisis) communications, and exit/IPO strategies.

Module 3: Family Office Excellence

This module covers Wealth Governance, including asset strategy and allocation, collaboration and task distribution between banks, family offices, and families, philanthropy and sustainable finance, as well as diverse asset classes such as real estate and art.

(Program changes remain reserved.)

Language

The course is held in English.

Course Duration

Each year from September to February.
Friday afternoons and Saturday mornings

Costs

CHF 9'800.–, including digital course materials, examination fees and the graduation ceremony.

Degree

Certificate of Advanced Studies UZH in Family Governance and Family Office Excellence, 15 ECTS Credits

Academic Advisory Board

- Dr. Sonja Kissling, LL.M., Mediator, Family Business Matters
- Alexia Rambosson, LL.M., Attorney at Law, Certified Tax Expert, Partner and Co-Owner, Steinbrüchel Hüsey
- Denise Schmid, MBA, Managing Partner and Co-Owner, Marcuard Family Office, Attorney at Law
- Marcel Schmid, MBA IMD, Managing Partner, Swissbridge Advisory AG, President, Swiss-Hong Kong Business Association

Application and Contact

Application

Apply by June 30 via the application form on the website.

The course will only be held, if there is a sufficient number of participants.

Location

Pädagogische Hochschule Zürich

Lagerstrasse 2

8090 Zurich

www.phzh.ch

Information and contact

Europa Institut at the University of Zurich

Bellerivestrasse 49

8008 Zurich

+41 44 974 04 00

eiz@eiz.uzh.ch

www.cas-eiz.uzh.ch

