

## Family Offices Turning to “Purpose of Wealth” to Prepare the Next Generation, New AITi Tiedemann Global and Campden Wealth Research Finds

June 29, 2026

*Early data from the 2026 AITi Tiedemann Global and Campden Wealth Family Office Operational Excellence Report shows that defining the purpose of wealth is rapidly becoming a top priority among family offices, largely driven by a desire to guide the next generation.*

NEW YORK--(BUSINESS WIRE)--Jun. 29, 2026-- AITi Global, Inc. (“AITi” or “AITi Tiedemann Global”) (NASDAQ: ALTI), a leading independent global wealth manager with approximately \$90 billion in combined assets, today released early findings from the 2026 AITi Tiedemann Global and Campden Wealth Family Office Operational Excellence Report (the “Report”), showing that more families than ever before are exploring and defining the purpose of their wealth.

Nearly half of all respondents, 48%, reported that they have begun to formally define the purpose of their wealth and are implementing steps to achieve this, up from 33% in 2025. The findings suggest that many families are moving beyond foundational governance tools, such as Investment Policy Statements, to address a broader question: what is the wealth ultimately intended to support, enable and sustain across generations?

### Key early findings include:

- **48%** of respondents reported that they have begun to formally define the purpose of their wealth and are implementing steps to achieve it, up from **33% in 2025**.
- **65%** of respondents who have begun defining their purpose said providing guidance to the next generation was a driver.
- **71%** have not yet, or not yet fully, engaged the next generation in the process.
- Nearly **60%** of respondents who said they have defined their purpose either used external support or later recognized they would have benefited from it.
- The early findings are based on responses from 126 family offices surveyed between February and May 2026.

The research points to a significant engagement gap. While many families see purpose as a way to prepare and guide the next generation, 71% have not yet or not fully engaged them in this process. This suggests a clear opportunity for families to involve rising generation members earlier and more meaningfully in discussions about the role, responsibilities and future of family wealth.

### Jill Shipley, Head of Governance and Education, AITi Tiedemann Global, commented:

“Many family offices are at a pivotal moment as they prepare to transition wealth to the next generation who may have markedly different world views and values. For many families, the conversation is shifting from simply preparing the wealth for the heirs, to preparing the heirs for the wealth.”

“The findings reveal a growing recognition that wealth alone does not prepare the next generation for ownership, responsibility, or stewardship. Families that are intentional about what their wealth is intended to support and make possible over time, are more likely to sustain both their wealth and their cohesion across generations.”

### About the research

The early findings are drawn from the third edition of the AITi Tiedemann Global and Campden Wealth Family Office Operational Excellence Report. The research was conducted between February and May 2026 and reflects responses from 126 family offices. The full 2026 Report, which focuses on the non-investment side of family offices, will be published in September 2026, bringing benchmarks, insights and actionable strategies.

To access the full set of early insights on purpose of wealth, [please click here](#).

[Sign up here](#) to receive the forthcoming full Report when it is available.

### About AITi Global, Inc.

AITi is a global wealth and investment partner to families, family offices, foundations and institutions, helping clients activate capital with clarity, bring structure to complexity, and plan with purpose across borders and generations. AITi combines the breadth of a global firm with the service offering of a family office to deliver solutions designed to meet the full complexity of wealth and capital. We currently manage or advise on approximately \$90 billion in combined assets and have an expansive network of approximately 490 professionals globally. For more information, please visit [www.aiti-global.com](http://www.aiti-global.com).

### About Campden Wealth

Campden Wealth is a family-owned, global membership organization providing education, connectivity, research and networking opportunities to families of significant wealth, supporting their critical decisions, helping to achieve enduring success for their enterprises and family offices, and preserving their family legacy. Campden Research supplies market insight on key sector issues for its client community and their advisers and suppliers. For more information: [www.campdenwealth.com](http://www.campdenwealth.com) Enquiries: [research@campdenwealth.com](mailto:research@campdenwealth.com)

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