ONIDA
FAMILY ADVISORS

OWNER COMPETENCY
Map

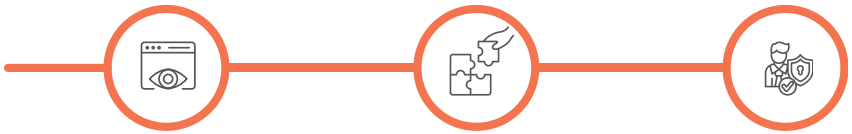
A structured, developmental framework to support ownership readiness in family enterprises and family offices.



COMPETENCY	EMERGING	DEVELOPING	ESTABLISHED	STEWARD
 **Purpose, Context & Stewardship** ☐	Understands what the family owns at a basic level ☐	Understands purpose and values ☐	Connects decisions to long-term goals ☐	Shapes direction and frames trade-offs across generations ☐
 **Ownership Mindset & Responsibility** ☐	Sees ownership passively ☐	Understands rights and responsibilities ☐	Engages actively in ownership role ☐	Demonstrates accountability for long-term outcomes ☐
 **Financial, Investment & Business Fluency** ☐	Reads summaries; basic terminology ☐	Understands risks and investments ☐	Evaluates opportunities and contributes views ☐	Integrates financial insight into strategy ☐
 **Governance Behaviour** ☐	Attends meetings; listens ☐	Prepares and participates appropriately ☐	Asks useful questions and supports decisions ☐	Models constructive challenge and discipline ☐
 **Judgement & Decision-Making** ☐	Understands basic decision principles ☐	Frames options with guidance ☐	Considers system-wide impact ☐	Makes balanced decisions under ambiguity ☐

COMPETENCY	EMERGING	DEVELOPING	ESTABLISHED	STEWARD
 **Family Office & Systems Understanding** ☐	Limited awareness of systems ☐	Understands roles of advisors ☐	Engages with structures and reporting ☐	Aligns systems with family goals ☐
 **Collaboration & Relationships** ☐	Respects roles and norms ☐	Communicates effectively ☐	Works across branches and supports others ☐	Builds trust and cohesion across generations ☐
 **Values, Ethics & Culture** ☐	Acts consistently with values ☐	Applies values in discussions ☐	Uses values in decision-making ☐	Shapes culture and reinforces norms ☐
 **Legacy, Continuity & Intergenerational Thinking** ☐	Focuses on present ☐	Understands succession basics ☐	Engages in legacy discussions ☐	Shapes long-term continuity across generations ☐
 **Self-Awareness, Identity & Development** ☐	Identity tied to ownership ☐	Explores strengths and motivations ☐	Demonstrates clarity of role ☐	Operates with grounded identity beyond ownership ☐

Development Experiences





PURPOSE & STEWARDSHIP

Exposure: Attend family legacy discussions
Contribution: Articulate purpose in meetings
Authority: Lead strategic or purpose discussions



OWNERSHIP MINDSET

Exposure: Attend owner meetings
Contribution: Take on defined responsibilities
Authority: Hold decision rights with accountability



FINANCIAL & INVESTMENT FLUENCY

Exposure: Attend investment reviews
Contribution: Analyze and present insights
Authority: Lead a portfolio or theme discussion



GOVERNANCE BEHAVIOUR

Exposure: Observe meetings
Contribution: Prepare inputs or co-present
Authority: Chair or facilitate discussions



JUDGEMENT & DECISION-MAKING

Exposure: Observe decision processes
Contribution: Frame options and trade-offs
Authority: Own bounded decision rights



FAMILY OFFICE UNDERSTANDING

Exposure: Meet advisors
Contribution: Engage in reporting discussions
Authority: Oversee a function or relationship



COLLABORATION & RELATIONSHIPS

Exposure: Participate in family forums
Contribution: Support alignment discussions
Authority: Lead complex conversations



VALUES & ETHICS

Exposure: Discuss values in real scenarios
Contribution: Apply values in decisions
Authority: Define norms and expectations



LEGACY & CONTINUITY

Exposure: Attend succession discussions
Contribution: Participate in planning
Authority: Help design future structures



SELF-AWARENESS

Exposure: Complete assessments
Contribution: Apply insights in real settings
Authority: Model grounded leadership identity