ONIDA

FAMILY ADVISORS

OWNERSHIP DEVELOPMENT TRACKER

This tool captures what has been accomplished, contributed, and learned over time as individuals grow into capable owners. Used consistently, it creates a shared record of progress for the individual, the family, and their advisors. Used alongside the Owner Competency Map, it helps track how experience translates into capability.

DEVELOPMENT IN ACTION

NAME	
DATE RANGE	

EXPERIENCE / ACTIVITY	COMPETENCY	LEVEL OF CONTRIBUTION	EVIDENCE / OUTCOME
Example: Completed personality assessment	*Self-Awareness, Identity & Development*	*Emerging*	*Realised where my strengths and gaps are, and why I struggle to make my voice heard in a large family group*

EXPERIENCE / ACTIVITY	COMPETENCY	LEVEL OF CONTRIBUTION	EVIDENCE / OUTCOME