High-Net-Worth & Family Office Strategy Guide

Investor Type	Investment Focus	Ideal For	Pros	Considerations
Accredited HNWIs	Liquid capital, flexible structures	Small-to-medium-scale, early stage	Fast access, lower friction	Requires strong trust, limited scale
Single-Family Offices	Personalized capital, trusted deals	Long-term, values-aligned partnerships	Deep pockets, relationship-driven	Difficult to access without referrals
Multi-Family Offices	Diversified portfolios, efficiency`	Larger investments, pooled due diligence	Process-oriented, strategic partnerships	Institutional pace and scrutiny

Checklist: Attracting Aligned Capital	Date Completed
Audit your network: Identify trusted advisors (CPAs, attorneys, lenders) for warm intros.	
Set a monthly goal: Commit to 3 new HNWI/ family office conversations.	
Plan events: Choose 2+ conferences or high-net -worth events to attend this quarter.	
Create value: Write one expert article or host a webinar showcasing your thought leadership.	
Pitch prep: Develop and rehearse a 15-minute pitch tailored for HNWIs or family offices.	

Relationship & Referral Mapping

Name	Role (CPA, Lawyer, etc.)	Warmth (1-10)	Referral Potential	Notes