

# 10 Reasons Investment Firms Must Build a Family Office Strategy — Starting Now

*There are over 4,000 legitimate family offices actively allocating capital globally. They are sophisticated, they move fast, and the relationships being built with them today will define a generation of capital partnerships. Here is why your firm cannot afford to wait.*

**4,000+**

LEGITIMATE GLOBAL  
FAMILY OFFICES

**8,000+**

VERIFIED CONTACTS  
IN DATABASE

**CIO**

DETAILED BIOS &  
INVESTMENT PREFS

**Tracked**

ACTUAL INVESTMENTS  
& ALLOCATIONS



**Gui Costin**

CEO & Founder, Dakota Marketplace · Published March 2026

# 10 Reasons Investment Firms Must Build a Family Office Strategy — Starting Now

---

The family office has become one of the most important — and most under-targeted — investor segments in global capital markets. Over the past fifteen years, driven by the extraordinary growth of private equity, private credit, private real estate, private infrastructure, and private energy, a new class of first-generation sophisticated investors has emerged. Former PE managing directors, private credit founders, infrastructure developers, technology entrepreneurs, and business owners who sold their companies to PE sponsors have all arrived at the same place: managing substantial personal capital through their own family offices, with institutional discipline and a genuine appetite for the best investment opportunities the market has to offer.

Yet many investment firms — GP fundraising teams, asset managers, placement agents, and alternative product distributors — have not yet built a deliberate, systematic strategy for engaging this audience. The reasons vary. Some firms lack the data to identify the right offices. Others are uncertain which family offices are serious, institutional-quality investors and which are not. Many simply do not know who to call. Dakota's family office database — covering over 4,000 legitimate global family offices, 8,000-plus verified contacts, detailed CIO bios, actual investment histories, and stated investment preferences — exists to solve every one of those problems. But first, here are the ten reasons why building a family office strategy is one of the most important distribution investments your firm can make.

---

## THE 10 REASONS

### 01 Family Offices Are Among the Fastest-Growing Sources of Institutional Capital in Private Markets

#### ACCELERATING GROWTH IN PRIVATE MARKETS ALLOCATION

The pool of capital controlled by family offices has grown substantially over the past fifteen years and continues to grow. Private equity, private credit, real estate, infrastructure, and energy have all produced enormous personal liquidity events for the professionals who built those businesses — and that wealth is flowing into family offices at an accelerating rate. Business owners who have sold their companies to PE sponsors represent another wave of new entrants, arriving with substantial capital and a sophisticated understanding of how private markets work.

Every year that passes, the family office universe gets larger, more institutional, and more relevant as a distribution target. The investment firms that began building family office strategies five years ago are ahead. But the universe is still expanding rapidly enough that the opportunity is genuine for firms that move decisively now.

**DAKOTA DATA**

Dakota tracks 4,000+ legitimate family offices actively allocating capital globally — continuously updated as new offices are formed and existing ones evolve their investment programs. The starting line for any systematic family office strategy.

## 02 These Are Sophisticated Investors Who Do Not Need to Be Educated — They Need to Be Educated - They Need to Be Engaged

**A NEW KIND OF INSTITUTIONAL COUNTERPART**

The most important thing to understand about the new family office investor is how different they are from the traditional wealth management client. A former PE managing director running a family office already understands IRR, TVPI, fund structures, co-investment economics, and manager due diligence better than most of the professionals calling on them. A business owner who sold their company to a PE sponsor has lived through a deal process from the inside. They know how capital works. They do not need a primer on alternative assets.

What they need is to be treated as the peers they are. Investment firms that approach family offices with educational materials and generic fund pitches will lose to those who arrive with relevant, specific, well-researched propositions that reflect genuine knowledge of the office's history, preferences, and current portfolio. The sophistication of this audience is a gift — it makes for faster, deeper, more productive conversations — but only for firms that are prepared to have them.

**DAKOTA DATA**

Dakota's detailed CIO bios give you the professional background, investment philosophy, and career history of the decision-maker before you pick up the phone. Walk into every conversation prepared to engage at the right level — not to explain, but to discuss.

## 03 Family Offices Make Decisions Faster Than Almost Any Other Institutional Investor

**SPEED AS A STRATEGIC ASSET**

Speed is one of the most underappreciated attributes of the family office as an investment partner. Institutional investors — public pensions, endowments, insurance companies — are constrained by investment committee cycles, board approval timelines, procurement processes, and regulatory requirements. A commitment decision that a pension might take four to six months to make can be completed by a well-run family office in days or weeks. That speed makes them enormously valuable partners in time-sensitive situations: a fund with a hard close approaching, a co-investment requiring fast capital, a secondary opportunity that will not wait for a quarterly committee meeting.

For GPs and investment firms managing deals and capital raises with deadlines, the ability to reach a family office investor who can evaluate and commit quickly is not a convenience — it is a strategic asset. Firms with systematic family office relationships have a liquidity option that those without them simply do not have.

#### DAKOTA DATA

Dakota's investment history and stated preferences for each family office let you identify quickly which offices are active allocators in your strategy and which are ready to move — so you are not spending time educating audiences that are not ready to act.

## 04 Family Offices Are the Most Loyal Long-Term Capital Partners in the Market

### DURABILITY THAT COMPOUNDS ACROSS FUND GENERATIONS

Capital that comes in through a family office relationship tends to stay. Unlike institutional allocators who face allocation review cycles, committee turnover, and policy-driven portfolio rebalancing, family offices that develop conviction in a GP or a strategy often maintain that relationship across multiple fund generations. The personal nature of the relationship — built between individuals who respect each other's judgment — creates a durability that is rare in institutional fundraising.

The compounding value of a strong family office LP cannot be overstated. A family office that commits in Fund III and builds conviction may be a cornerstone investor in Fund IV, a co-investor alongside Fund V, and a referral source for other family offices throughout. The lifetime value of a well-managed family office relationship often exceeds that of larger institutional commitments that come and go with personnel changes and allocation shifts.

#### DAKOTA DATA

Dakota tracks actual investments made by each family office — showing you which offices have committed to multiple funds with the same manager, a reliable signal of the kind of long-term conviction that makes for a durable LP partnership.

## 05 The Co-Investment Opportunity With Family Offices Is Significant and Growing

BEYOND THE FUND: A DIFFERENT KIND OF PARTNERSHIP

Many of the most sophisticated family offices — particularly those built by former private markets professionals and business owners who understand operating companies — are not looking only to commit to funds. They want to co-invest directly alongside GPs in specific transactions. This appetite for deal-by-deal participation creates a category of engagement that goes far beyond the traditional LP relationship and opens the door to a genuinely different kind of partnership.

For GPs, family office co-investors offer several advantages beyond the capital itself. They often bring operational expertise and industry relationships relevant to specific portfolio companies. They are typically low-maintenance co-investors who understand the economics and do not require the same level of reporting and communication that institutional co-investors sometimes demand. And because the relationship is personal, they are more likely to be repeat co-investors across multiple transactions — deepening the partnership with every deal.

### DAKOTA DATA

Dakota's database identifies family offices with a documented history of co-investment activity and relevant industry backgrounds — letting you match co-investment opportunities to the partners most likely to have both the appetite and the expertise to add value beyond the check.

## 06 Business Owners Who Sold to PE Are Creating a Brand New Wave of Family Offices - and They Are Ready to Invest

THE FASTEST-GROWING AND MOST UNDERSERVED SEGMENT

One of the most significant and underappreciated drivers of new family office formation is the explosion of PE buyout activity over the past decade. As private equity firms have deployed record amounts of capital acquiring privately held businesses — manufacturing companies, healthcare practices, business services firms, technology companies, and more — the founders and CEOs who built those businesses have received life-changing liquidity events. Many are walking away from sales with \$50 million, \$100 million, \$250 million, or more — and immediately facing the question: how do I deploy this capital intelligently?

These are not financial engineers, but they are deeply credible investors with real operating insight. They know industries. They know what it means to build a business from the ground up. They have lived through a PE deal process from the seller's side, which gives them genuine perspective on what makes a good sponsor and a good transaction. This community is one of the fastest-growing and most underserved segments of the entire family office universe, and investment firms that identify and engage them early will have a meaningful head start.

**DAKOTA DATA**

Dakota's continuously growing database captures newly formed family offices — including those launched by first-generation business owners and entrepreneurs — so your outreach reaches these investors while relationships are still being formed, not after they are already committed to your competitors.

## 07 Family Offices Have Long Time Horizons That Make Them Ideal Private Market Partners

**ILLIQUIDITY AS A FEATURE, NOT A CONSTRAINT**

One of the structural advantages of the family office as an investment partner is the genuinely long time horizon they can bring to private markets. Unlike institutional allocators constrained by liability matching requirements, regulatory capital rules, or beneficiary distribution obligations, a family office managing multi-generational wealth can invest with patience that few other investors can match. Illiquidity is not a problem to be managed — it is a feature to be embraced in exchange for the premium it generates.

This long-horizon orientation makes family offices structurally ideal for private equity, infrastructure, private credit, and real assets — the very strategies where illiquidity premiums are most significant. For GPs managing funds with longer hold periods or less conventional liquidity profiles, family office investors represent a category of LP that is genuinely well-suited to the investment rather than simply tolerating its characteristics.

**DAKOTA DATA**

Dakota's investment preference data identifies which family offices have expressed appetite for illiquid, long-duration strategies — helping you match your fund's liquidity profile to LPs who are genuinely well-suited to it, not just willing to tolerate it.

## 08 Family Offices Are Highly Networked — One Relationship Opens Many Doors

**REPUTATION AND REFERRAL EFFECTS IN A CONNECTED COMMUNITY**

The family office community is a remarkably interconnected one. CIOs and principals at family offices talk to each other — about investment opportunities, about manager quality, about which GPs are worth meeting and which are not. A strong relationship with one respected family office frequently opens doors to others in their network that would take years to develop through cold outreach. Conversely, a poor interaction or a misaligned pitch can close doors just as quickly.

This network effect means that the quality of your family office strategy matters as much as the quantity of relationships you pursue. Firms that approach the family office community with genuine preparation, intellectual

respect, and relevant ideas build reputations that travel. Firms that approach it with high-volume, low-personalization outreach build different reputations — and those travel even faster.

#### DAKOTA DATA

With 8,000+ verified contacts across 4,000+ family offices, Dakota gives you the breadth to build systematically and the depth — through CIO bios and investment histories — to approach every relationship with the personalization that earns trust and generates referrals.

## 09 Most Investment Firms Do Not Have a Systematic Family Office Strategy — Which Means the Competitive Opportunity is Real

### SYSTEMATIC COVERAGE IN AN UNSYSTEMATIC MARKET

For all the reasons described above, it might seem obvious that every investment firm would have a well-developed family office strategy. The reality is that most do not. Family office coverage has historically been relationship-driven and opportunistic — built around personal connections rather than systematic outreach. The data required to identify, qualify, and reach the right contacts at the right offices has been scattered, incomplete, or unavailable at a useful scale.

That dynamic represents a genuine competitive opportunity for firms willing to invest in building a deliberate family office distribution strategy. The universe of 4,000-plus legitimate family offices actively investing globally is large enough to support systematic coverage. The firms that build systematic family office programs in the next two to three years will have a structural advantage over those that continue to rely on chance encounters and personal networks that do not scale.

#### DAKOTA DATA

Dakota converts family office coverage from a relationship-dependent art into a data-driven discipline — giving your team a systematic starting point for every market, every strategy, and every new fund raise, rather than relying on who happens to be in someone's personal network.

## 10 The Relationships Being Built Today Will Define Family Office Capital Partnerships for the Next Decade

THE WINDOW IS OPEN — BUT NOT STANDING STILL

Perhaps the most compelling argument for building a family office strategy now is the simplest one: the families who are forming offices today, deploying capital today, and building investment relationships today are deciding which managers and which firms will be their long-term partners. Those decisions, once made and reinforced by positive experience over multiple fund cycles, are not easy to displace. The GP who becomes a trusted partner to a family office in their formative years has an enormous advantage over those who attempt to enter that relationship later.

The window is not closing immediately. But it is not standing still. Every quarter that passes without a systematic family office strategy is a quarter in which competitors are having the first conversations that become decade-long capital partnerships. The opportunity is real, the data to pursue it is available, and the cost of waiting compounds in exactly the same way that the benefit of acting does — just in the opposite direction.

### DAKOTA DATA

Dakota's family office database is continuously updated as new offices are formed, investment teams evolve, and preferences change — so your firm is always working from the most current picture of who is allocating, what they own, and what they are looking for next.



***The families allocating capital today are choosing their long-term investment partners. The firms that reach them first, with genuine preparation and the right intelligence, will build relationships that last a decade or more.***

---

## Dakota Family Office Intelligence

*The Most Comprehensive Database in the Market*

Over 4,000 legitimate global family offices. Over 8,000 verified contacts. Detailed CIO bios, actual investment histories, and stated investment preferences — built for investment firms that are serious about making family office coverage a core part of their distribution strategy.

4,000+

GLOBAL FAMILY OFFICES

8,000+

VERIFIED CONTACTS

CIO

DETAILED BIOS

Live

INVESTMENT PREFERENCES

### 4,000+ Global Family Offices

Comprehensive coverage of single-family offices actively investing across North America, Europe, Asia-Pacific, the Middle East, and Latin America — every size, every strategy, every stage of development.

### Detailed CIO Bios

In-depth profiles of the investment decision-makers at each family office — professional background, prior institutional roles, career history, and investment philosophy. Know who you are calling before you call.

### Actual Investments & Preferences

Tracked data on fund commitments, co-investments, and direct investments made — alongside stated investment preferences by strategy, geography, and asset class. Know what they own and what they want next.

### 8,000+ Verified Contacts

Direct contact information for CIOs, investment directors, and senior decision-makers at family offices globally. The right person at the right office — no gatekeepers, no guesswork.

See how Dakota's family office database can transform your distribution strategy.

[› REQUEST A DEMO](#)