Family Office Quarterly Security Review

A governance-grade quarterly review covering people, residences, travel, digital exposure, vendors, and events for UHNW families.

People

- Re-vet household staff, drivers, nannies, and personal assistants (annual minimum, quarterly for new hires).
- Confirm background standards for any new contractor with residential access.
- Review children/young-adult travel, social activity, and school routine changes.
- Audit principal's public calendar exposure (speaking, board, charitable, regulatory).

Residences

- Walk every residence: locks, cameras, alarm coverage, panic protocols, safe room readiness.
- Confirm landscaping, package delivery, and contractor access controls.
- Review residential staff communications and escalation chain.
- Verify off-site monitoring contract is current and responsive.

Travel

- Review every Tier 2+ trip from the prior quarter for incidents, near-misses, and lessons.
- Confirm pre-travel intelligence cadence for the next quarter's confirmed trips.
- Audit private aviation tail numbers, FBO patterns, and online flight-tracking exposure.
- Verify medical and evacuation contacts current for principal and family.

Digital Exposure

- Doxxing audit on principal, spouse, children, and family office leadership.
- Review impersonation, voice-clone, and AI-fraud risk against finance and household staff.
- Confirm two-channel verification rules for any payment or itinerary change.
- Refresh social-media privacy and removal of identifying real-time content.

Vendors and Events

- Re-confirm vendor list with residential access (caterers, contractors, AV, security).

- Review insurance, contract, and confidentiality terms for high-touch vendors.
- Plan security envelope for upcoming weddings, galas, holidays, and family gatherings.
- Document any incident or anomaly into the family risk register.

AMERINE builds and reviews UHNW family security programs covering people, residences, travel, digital, and events. Request a confidential program review at amerineep.com/contact.