

IE University, Franklin Templeton, and OpenWealth team up to launch the IE Family Offices Knowledge Hub

Madrid, 1 July 2025

IE University, Franklin Templeton, and OpenWealth (CaixaBank Group) are delighted to announce they have partnered to launch the [IE Family Office Knowledge Hub](#), an academic and business platform dedicated to the generation and dissemination of knowledge around Family Offices, driven by the [IE Center for Families in Business](#).

As Family Offices grow in significance for investment and legacy preservation, the Hub aims to offer comprehensive knowledge that blends academic research with practical insights to address the real challenges families face when managing multigenerational wealth. Its agenda includes applied research, strategic meetings, content creation, and training programs for decision-makers.

In its first year of activity, a global report on *The Role of Family Offices as Investors in Private Markets* will be conducted. The study will examine their decision-making processes, strategic and operational challenges, and emerging investment opportunities. It will also analyse how the market is adapting its infrastructure and processes to meet the specific needs of these investors.

Cristina Cruz, Director of the IE Center for Families in Business and Head of the IE Family Offices Knowledge Hub, outlined the Hub's strategic priorities at the Hub's official presentation, which took place at IE University's vertical campus IE Tower this morning. Internationally recognised for her longstanding career in the study of family business, Dr. Cruz emphasised the importance of Family Offices as investment structures through which business families channel their transformation power: "This Hub has been established to help understand and support a significant evolution: the shift from families that create companies to families that invest in them. It is the era of the Entrepreneurial Family Office that not only preserves wealth but also projects it into the future, generating economic and social impact through a logic of purpose, long-term vision, and entrepreneurial investment," she noted.

At the event, which received attendees from the business, financial, and academic sectors, **Javier Villegas**, Head of Distribution for Iberia and Latin America at Franklin Templeton, discussed the main trends and opportunities in Private Markets and the role of Family Offices as multigenerational investors. He said: "We are excited to support this initiative focused on generating and sharing knowledge about Private Markets and Family Offices. Understanding the dynamics, strategies, and best practices of this investment structure, which is essential for preserving the legacy of business families, requires extensive research initiatives like this one."

The event also included a panel discussion moderated by **Marta Alonso Jiménez**, General Manager of OpenWealth (CaixaBank Group). It featured several Family Offices representatives with extensive experience in alternative investments, wealth governance structures, and intergenerational planning. Marta Alonso said: "The Family Offices ecosystem is currently experiencing growth and increased professionalisation in Spain. Initiatives like this one contribute significantly to enhancing the key role Family Offices play in Spain's economic and social development, through the promotion of philanthropy, business networks, and innovation."

This initiative demonstrates the collective effort of the three partners to produce detailed and practical knowledge on how Family Offices manage investment and governance issues in increasingly complex market environments.

About the IE Center for Families in Business

With more than 25 years of experience, the IE Center for Families in Business is an international reference in applied research on family businesses, responsible ownership, and intergenerational wealth management. Its approach combines academic rigor with a real and ongoing connection with the global business ecosystem, guiding business families in creating long-term value.

About Franklin Templeton

Franklin Resources, Inc. [NYSE:BEN] is a global investment management organisation with subsidiaries operating as Franklin Templeton and serving clients in over 150 countries. Franklin Templeton's mission is to help clients achieve better outcomes through investment management expertise, wealth management and technology solutions. Through its specialist investment managers, the company offers specialisation on a global scale, bringing extensive capabilities in fixed income, equity, alternatives and multi-asset solutions. With more than 1,500 investment professionals, and offices in major financial markets around the world, the California-based company has over 75 years of investment experience and \$1.57 trillion in assets under management as of 31 May 2025. For more information, please visit <http://www.franklintempleton.co.uk> and follow us on LinkedIn, X, and Facebook.

About OpenWealth

OpenWealth is CaixaBank's subsidiary dedicated to providing independent wealth consulting services for UHNW (Ultra High Net Worth) clients. With nearly €9 billion in assets under supervision, it is the largest wealth consulting firm for large clients and the largest Multi-Family Office service in Spain.

OpenWealth provides a holistic service from an independent entity that addresses all client needs, from the strategic wealth planning process, strategic asset allocation, and consolidated information, to assisting families in selecting and managing relationships with financial, real estate, or Private Markets providers.

Discover more about the [IE Family Offices Knowledge Hub](#) here.