



PRESS KIT · SEPTEMBER 2026

# Understand each other, pass it on **together.**

The wealth transfer platform built around every member of the family.

Public launch at Trust Valley Days, Lausanne, September 23 and 24, 2026.

# FamilyLegacy opens its wealth transfer platform: understand each other, pass it on together

Backed by Trust Valley, the Lausanne-based startup opens its platform to the public at Trust Valley Days on September 23 and 24. The idea: before you talk assets, taxes and who gets what, find out what each member of the family actually wants.

An estate is usually prepared with a notary, a tax advisor and a banker. One question tends to come up too late: what does each person actually want? Who wants to keep the family house? Who is thinking about taking over the business? Who cares about the grandmother's ring, worth little on paper and everything to someone?

Disagreements about money are usually about something else: recognition, what feels fair, attachment, family history, each person's place in the family. And the conversation often never happens. In the United Kingdom, 80% of adults surveyed for STEP say their family does not know their wishes for after they die.

Wealth management has built excellent tools for assets. It has built almost none for the relationships between the people passing wealth on and the people who will receive it. That is the gap FamilyLegacy sets out to fill.

The platform brings together the people, their expectations, the assets and the family's professional advisors. Each member starts alone, at their own pace, with the Personal Mirror, a guided reflection developed with the support of experts in family and relationship dynamics. With the Family Reveal, the family then sees where everyone stands and what each person expects, which sets up the conversation. From there it moves on to assets, gifts and distribution scenarios the family can discuss and vote on. The first step can come from the parents or from the children: people now inherit around

age 50 on average, and it is often the younger generation that opens the subject.

**“Wealth can be inherited. A legacy has to be built on purpose.”**

Edouard Mondron, founder of FamilyLegacy

Privacy sits at the center of the product. Each member's personal data is encrypted with a key that unlocks only when they sign in: FamilyLegacy holds no key that opens the content. Data is hosted in Switzerland, and professionals invited by the family see only what the family opens to them. FamilyLegacy does not sell data.

FamilyLegacy works upstream, supporting professionals rather than replacing them: families walk into their notary's, attorney's or advisor's office better prepared. A dedicated space lets notaries, private banks and family offices follow the families they serve, with the family's consent. Family offices and private banks in Switzerland and France are already in conversation with the team. On September 14, Edouard Mondron spoke in Cambridge to an audience of family offices during Cambridge Tech Week.

For its launch, FamilyLegacy is opening the Circle of 100 Founding Families: lifetime access for a one-time €5,000, up to 15 members per family, all future releases included, with personal onboarding and a 14-day money-back guarantee. After that, the platform moves to an annual subscription priced on the family's wealth.

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**About FamilyLegacy.** FamilyLegacy is a private, secure wealth transfer platform built around every member of the family: what each person expects, how they relate to one another, the assets, and the decisions to make together. Founded by Edouard Mondron and Arnaud Collette, the company is based in Prilly, near Lausanne, and backed by Trust Valley. [www.familylegacy.tech](http://www.familylegacy.tech)

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# Families don't tear each other apart only **over money.**

Behind the assets sit fairness, attachment and each person's place in the family.

**80%**

of UK adults surveyed say their family does not know their wishes for after they die. Only 16% have talked about it with the people close to them.

**~50 years**

average age at which people inherit in France, against roughly 30 in the early 20th century.

**41%**

of professionals surveyed by STEP see estate disputes rising in blended families.

Sources: STEP, STEP Barometer 2026 (533 legal, tax and wealth professionals) and Censuswide survey of UK adults for STEP (May 2026); Conseil d'analyse économique, "Repenser l'héritage," Note no. 69, December 2021.

## The questions that matter when wealth changes hands

“Who keeps the family house?”

“Who takes over the business?”

“What would be fair to everyone?”

“Who actually wants grandmother's ring?”

## The missing piece

Wealth management has built excellent tools for assets. It has built almost none for the relationships between the people passing wealth on and the people who will receive it.

The advisor manages the assets. The mediator arrives once the disagreement is already there. FamilyLegacy sits before both: everyone says what they expect, what they are attached to, and where their reading of the situation differs from the rest of the family.

## People inherit later and later

Around age 50 on average, by which point the children have usually made their big life choices. The conversation no longer has to wait for the parents: a child can start it and invite the rest of the family in.

## Professionals take the hit

When no one ever said what they wanted, the tension lands on the notary, the attorney or the banker, sometimes months after the estate is settled. FamilyLegacy does the groundwork that makes their job easier.

# From “me” to “us”: understand, talk, **decide together.**

## 01

### The Personal Mirror

Each member starts alone, at their own pace, with a guided reflection developed with the support of experts in family and relationship dynamics. They work through how they see the transfer, the family and the things that matter to them. They get a personal summary, and they decide what to share.

## 02

### The Family Reveal

The family sees where each member stands, what they expect and what they are attached to. The point is to understand one another and set up the conversation, before making the decisions that matter together.

## 03

### Assets and scenarios

Family tree, inventory of assets (real estate, business, investments, valuables), gifts, and distribution scenarios the family discusses, adjusts and votes on.

## 04

### The professionals

Notary, attorney, private banker, family office, mediator if needed: the family invites them when it helps and chooses what they see. Each one works in their own field. FamilyLegacy does the groundwork.

## What changes for the family

Peace of mind for the person passing it on

A voice for every heir

Decisions understood, not imposed

A family closer than it was before

## What comes next

A German version, a budget simulator, a directory of professionals, and a dedicated offering for notaries, private banks and family offices.

FamilyLegacy is a preparation and reflection tool. It does not replace legal, tax or wealth advice, and it does not replace a mediator or a health professional.



## Trust, **piece by piece.**

- **One key per member.** Personal data is encrypted (AES-256) with a key that unlocks only when that member signs in. FamilyLegacy holds no key that opens the content.
- **Protected access.** Password and two-factor authentication.
- **Hosted in Switzerland.** A Swiss company, with data hosted in Switzerland.
- **Everyone stays in control.** Personal answers stay private, and each member chooses what to share.
- **Access on the family's terms.** A professional sees only what the family opens to them. Nothing is shared with a partner by default: it takes explicit consent, and that consent can be withdrawn.
- **Support cannot let itself in.** The family grants support temporary access, and that access closes at the end of the session.
- **No resale, no model training.** No data sales, no behavioral advertising, and encrypted content is never used to train models or build commercial profiles. The business model rests on access to the platform. Built to comply with the European GDPR and the revised Swiss Federal Act on Data Protection (nFADP).

These commitments are written into the terms of service accepted by every family (July 2026 version), published at [www.familylegacy.tech](http://www.familylegacy.tech).

### ECOSYSTEM

FamilyLegacy is backed by **Trust Valley**, the Lake Geneva alliance for digital trust and cybersecurity, launched in 2020 at EPFL with the cantons of Vaud and Geneva.

## The Circle of 100 Founding **Families.**

### LIFETIME ACCESS

# €5,000

One-time payment, no subscription

Up to 15 members per family

All future releases included

Personal onboarding when the account opens

14-day money-back guarantee

Limited to the first 100 families. After that, the platform moves to an annual subscription priced on the family's wealth.

### PUBLIC LAUNCH

**Trust Valley Days, Lausanne**  
September 23 and 24, 2026

# Two founders, one belief: behind every estate, a human story.



## Edouard Mondron

FOUNDER · STRATEGY AND GROWTH

Entrepreneur, investor and family wealth strategist, raised in one of Belgium's oldest industrial families. His own experience of family wealth, a family business and its transfer led him to build FamilyLegacy around what rarely fits in a wealth report: the relationships between people. In September 2026 he spoke in Cambridge to an audience of family offices during Cambridge Tech Week.

**“Wealth can be inherited. A legacy has to be built on purpose.”**



## Arnaud Collette

CO-FOUNDER · DESIGN AND TECHNOLOGY

Entrepreneur, designer and user experience specialist for the past fifteen years. He designs and builds the platform.

**“Technology should never replace human relationships. It should strengthen them.”**

The guided reflection was developed with the support of experts in family and relationship dynamics. FamilyLegacy is backed by Trust Valley, the Lake Geneva alliance for digital trust launched at EPFL.

# What gets passed down should bring generations closer, **not split them apart.**

**Our reason for existing fits in one line: a family that understands itself passes wealth on better.**

We believe in a world where every family can talk about what actually matters. Where each person can say what they care about, hear what everyone else cares about, and decide together, without waiting for the question to land in a crisis or in a notary's office.

The family is our first team: the first place we learn, the first place we trust, the first place anything is handed down. It is also the least equipped to do it. Everything has been built for the assets, almost nothing for what connects the people passing them on and the people receiving them.

That is why FamilyLegacy brings together technology and an understanding of family dynamics: to help families understand each other, talk to each other and pass things on. Not only wealth, but what holds them together and what they want to last. On their own terms and at their own pace: every family stays in control of what it shares and how fast it moves.

**“The family is our first team. The first place we trust, the first place we learn, the first place anything is handed down.”**

Edouard Mondron, founder of FamilyLegacy

## Our compass

- **Everyone has a voice**, including the people who rarely use it.
- **The conversation first**, the decisions after.
- **The family decides**, the platform does the groundwork.
- **What is said in the family** stays in the family.
- **It goes better when you explain it yourself**, while you are still here.

## What we do

A private space where each person speaks for themselves first, then with the family, where the family lays out its assets and prepares its decisions with the professionals it invites.

## What we don't do

No legal, tax or wealth advice, no mediation, no health support. We decide for no one, and we sell no data.

# Six angles for telling the FamilyLegacy story.

- 01 The great wealth transfer has started. The conversation hasn't.** In the United States, \$124 trillion is set to change hands by 2048 (Cerulli). 77% of professionals surveyed by STEP have seen signs of it over the past twelve months, and in the UK 80% of adults say their family does not know their wishes.
- 02 When the children start the conversation.** People now inherit around age 50, against 30 a century ago. 87% of millennials and Gen Z say these conversations matter to them, yet 70% of family members find them hard to start (J.P. Morgan Family Wealth Institute, January 2026).
- 03 Professionals take the hit.** Notaries, private bankers and family offices absorb the family tension. Even the best equipped are barely prepared: only 27% of family offices have a structured process for preparing their heirs (UBS, May 2026).
- 04 In France, succession stalls on the human side.** 87% of family business owners have started a succession process, but only 6% have fully handed over, and 42% fear leaving a burden behind (EY and OpinionWay barometer, 222 owners, September 2026).
- 05 Talking about feelings and money without exposing your data.** A Swiss company backed by Trust Valley, where every member keeps the key to their own data.
- 06 A founder from an old Belgian industrial family**, invited to Cambridge to speak to family offices.

## Fact sheet

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|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Company</b>       | FamilyLegacy Sàrl, Route des Flumeaux 48, 1008 Prilly (VD), Switzerland                                                                                                 |
| <b>Founders</b>      | Edouard Mondron, Arnaud Collette                                                                                                                                        |
| <b>Business</b>      | Private wealth transfer platform                                                                                                                                        |
| <b>Ecosystem</b>     | Backed by Trust Valley, Lausanne                                                                                                                                        |
| <b>Languages</b>     | French and English (German coming)                                                                                                                                      |
| <b>Public launch</b> | September 23 and 24, 2026, Trust Valley Days, Lausanne                                                                                                                  |
| <b>Launch offer</b>  | Circle of 100 Founding Families, €5,000 for lifetime access                                                                                                             |
| <b>Online</b>        | <a href="http://www.familylegacy.tech">www.familylegacy.tech</a> · product video: <a href="https://youtube.com/watch?v=b4s74kTXjf8">youtube.com/watch?v=b4s74kTXjf8</a> |

### PRESS CONTACT

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Logo, portraits and product screenshots available on request.

## Sources and references.

Every figure in this press kit comes from a publication available online.

### Figures cited in this press kit

**STEP.** STEP Barometer 2026 and Censuswide survey for STEP, May 2026. 533 legal, tax and wealth professionals, plus a panel of UK adults.

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**J.P. Morgan Family Wealth Institute.** "The Quiet Disconnect in Family Wealth Conversations," January 2026. 300 Americans with more than \$10 million, surveyed from March to May 2025, plus 21 one-on-one interviews.

[www.jpmorgan.com/insights/family-legacy](http://www.jpmorgan.com/insights/family-legacy)

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**EY, For Talents, FBN France and OpinionWay.** Family business succession barometer, 2nd edition, September 7, 2026. 222 French business owners surveyed from April 15 to June 15, 2026.

[www.ey.com/fr\\_fr/newsroom/2026/09](http://www.ey.com/fr_fr/newsroom/2026/09)

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**Cerulli Associates.** \$124 trillion in wealth to be transferred by 2048 in the United States, December 2024.

[www.cerulli.com/press-releases](http://www.cerulli.com/press-releases)

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**UBS.** Global Family Office Report 2026, May 28, 2026. 307 family offices across more than 30 markets.

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### Further reading

**IMD, Family Enterprise Legacy Institute and Family Business Network.** Global Family Enterprise Mental Health Report, September 2026. 246 members of entrepreneurial families across 37 countries.

[www.imd.org/research-knowledge/family-business](http://www.imd.org/research-knowledge/family-business)

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**IMD.** The Global Family Office Report, December 2025.

[www.imd.org/research-knowledge/family-business](http://www.imd.org/research-knowledge/family-business)

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**PwC.** Global Family Business Survey 2025, October 13, 2025. 1,325 family businesses across 62 countries: preserving the family legacy ranks first among long-term goals, at 77%.

[www.pwc.com/gx/en/news-room](http://www.pwc.com/gx/en/news-room)

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**UBS.** Own Your Worth 2025, "Heir dynamics," May 7, 2025. 2,000 American women investors: nearly one in three who inherited from their parents had never had a conversation with them about it.

[www.ubs.com/own-your-worth](http://www.ubs.com/own-your-worth)

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