NEXORA

OPERATING DOCTRINE · REVISED 13 OCTOBER 2026

How a NexOra mandate is governed and delivered

The principles, responsibilities and working arrangements behind a NexOra mandate. This document gathers the reference content of the NexOra website into one printable record.

Mandate at a glance

Direction	The principal, family office or designated representative defines the work.	**Leadership**	NexOra coordinates delivery through an accountable lead.
Approval	Decisions follow the agreed scope, the decisions the client keeps, and spending limits.	**Continuity**	Plans and practical knowledge are kept for the family in the agreed format.

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Selected Assignments describe completed NexOra work; client identities are not disclosed. Illustrative scenarios and specimens are hypothetical, use fictional data and are not accounts of completed engagements. Photographs are illustrative stock images. Application screens come from the NexOra Private Operations demonstration account.

Online: https://nexoraprivateoffice.com/our-approach/

OUR APPROACH

How NexOra works within your structure

You set the priorities and the limits of NexOra's authority. NexOra provides a named lead to connect the teams, prepare the work and follow it through.

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Mandate and direction

Private operations involve many teams, places and specialists. NexOra connects their work through a named lead, a written mandate and a shared operating record, takes recommendations to the right decision-maker and follows agreed actions through.

Where coordination helps: six common challenges

Well-run offices handle these matters. They become harder as homes, providers and people multiply.

COORDINATION CHALLENGES AND NEXORA'S RESPONSE

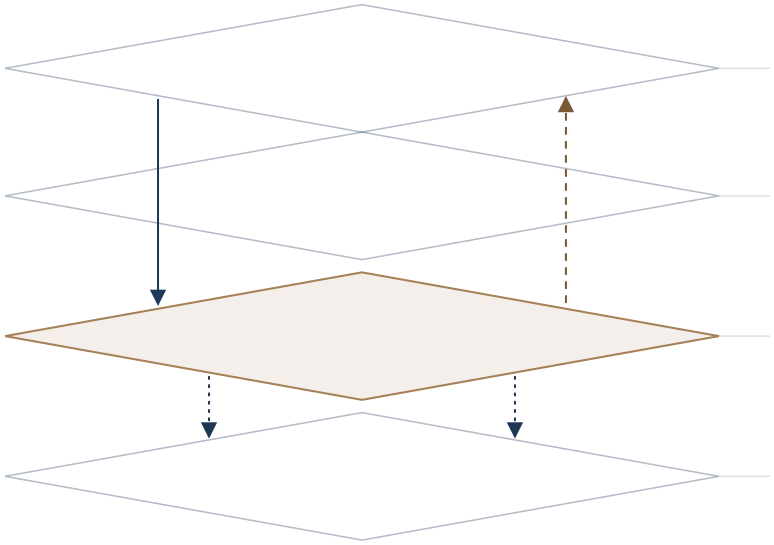
AREA	COORDINATION CHALLENGE	NEXORA'S ROLE
Integration	Work spans offices, households and providers, each seeing part of the picture.	One lead connects their work and refers decisions to the right approver.
Knowledge	Practical knowledge sits with individuals and changes hands with staff.	Procedures and lessons are written down, and used to brief new team members.
Specialist briefings	Specialists need consistent, current information, often at short notice.	Each receives a brief from the same record, limited to what their role needs.
Problems	Urgency and authority can blur when something goes wrong.	How urgent it is and who may decide are set separately, in advance (see urgency and authority).
Providers	Service standards and renewal dates are easy to lose sight of.	Commitments tracked, delivery reviewed and options brought before renewal.
Costs	Spending is spread across many invoices and budgets.	Spending reported against approved budgets, with differences explained.

Who gives direction

NexOra works alongside family offices, advisors, assistants, household teams and specialist providers, adding leadership and hands-on delivery. NexOra can be appointed through a family office or directly by the principal or the family's designated representative. "The client" means whichever of these the mandate names.

Layers of responsibility

WHAT EACH LAYER HOLDS



A · PRINCIPAL

Principal and family

Set priorities and hold the mandate

B · OFFICE OR REPRESENTATIVE

Family office or designated representative

Documents the agreed scope, approval limits and reporting line

C · NEXORA

Named lead and backup

Leads delivery, oversees providers, recommends within the mandate

D · DELIVERY

Household teams, specialist providers, network partners

Specialists keep their professional judgment

Mandate and delegated authority

From the principal and family, through the office or representative.

Reports and approval requests

Back by the same route.

Coordination and briefings

To teams, specialists and network partners, who keep their professional responsibility.

Terms of the role

The mandate

The work NexOra leads is set out in writing. Anything outside it is referred to the client.

What authority means

Leading and coordinating the work, overseeing providers and making recommendations. The mandate is a contract: it gives no governmental, regulatory or licensing power, no unrestricted control, and no say over specialists' professional judgment.

Reporting line

NexOra reports to the client's designated representative and follows the client's confidentiality and purchasing policies.

Approval

Spending, appointing providers and dismissing them follow the approval rules: what NexOra may decide on its own, the decisions the client keeps, and spending limits. NexOra recommends; the designated approver (the person the client authorises to decide) decides anything outside them. See how decisions are made.

Specialists lead in their fields

Investment, legal, tax, medical, security, aviation and vessel operations remain with qualified providers. NexOra briefs, coordinates and follows up with them.

Leadership and delivery

Responsibility through completion. The lead follows agreed actions from preparation through delivery, keeping outstanding work visible and referring decisions to the person authorised to make them. Appointed specialists retain responsibility for their professional work.

One accountable lead

A named lead is the client's main point of contact: looking ahead to what needs preparing, weighing the options, coordinating providers and following agreed actions through.

A named backup and agreed coverage

A named backup works from the same plan and records under the agreed coverage arrangements. Working hours, out-of-hours cover and handovers are agreed for each engagement. If responsibility passes to a new lead, the handover covers current plans, preferences, provider commitments, outstanding actions and approval arrangements.

When something goes wrong

Every request or problem goes through four steps: it is **acknowledged**, its **urgency is judged**, the **right provider is brought in** and it is **followed until resolved**. Response times depend on the cover and providers in place, so they are agreed in the operating plan rather than promised in general.

- **Preparation.** Alternatives ready before they are needed.
- **Provider briefings.** Each provider briefed in writing on its part.
- **Readiness checks.** A provider's confirmation is not readiness: an arrangement is ready only once it has been checked.

Checked before anyone relies on it

Preparations are checked before the family relies on them; anything unfinished before an arrival goes straight to the lead.

- **Escalation.** Problems raised quickly with the person who can act.
- **Decision records.** What was recommended, who approved it and when.
- **Handovers.** Current plans, commitments and outstanding actions passed on in writing.

Priority is separate from permission

Two questions are asked about every problem: how urgent it is, and who may approve what happens next. **Being urgent does not give the lead more authority.**

Event priority

How urgently an issue needs attention

ROUTINE	Handled in the normal cycle; reported in the regular update.
ELEVATED	Affects a plan under way; handled the same day.
URGENT	Affects a movement or arrival in progress; handled at once.
EMERGENCY	Safety, health or security; agreed protocols apply.

Decision authority

Who may approve action, spending or commitments

PRE-APPROVED	The lead acts within the agreed scope and limits set in the approval rules, then reports.
REFERRED	The lead prepares options and a recommendation; the designated approver decides.
PROTOCOL	Emergency action follows protocols agreed in advance, led by the relevant specialist.

THE SAME PRIORITY CAN FALL UNDER DIFFERENT AUTHORITY

PRIORITY	WITHIN PRE-APPROVED AUTHORITY	REFERRED TO THE DESIGNATED APPROVER
ROUTINE	Rebooking a restaurant within the agreed budget	Changing a household supplier
ELEVATED	Replacing a delayed driver with an approved provider	A replacement contractor above the cost threshold
URGENT	An alternative from the approved list, within the pre-agreed limit	Any option not yet approved, or a cost above the limit
EMERGENCY	Actions named in the agreed protocol, taken with the relevant specialist	Anything the protocol does not cover, referred at once

Plans for medical, security, legal, transport-disruption and residence emergencies are prepared for each engagement with the family's qualified advisors and providers. The priority levels describe urgency; they are not response-time guarantees.

Local preparation, checks and problem-solving on the ground are covered under Global Field Operations.

Checks before each journey

Settled before each journey, not on the day.

Pre-departure checks

Documents, bookings, receiving arrangements and the day's contacts confirmed.

Back-up options

Approved back-up operators, routes and accommodation identified in advance.

What the plan depends on

What each plan cannot go ahead without, and who confirms it.

Specialist response contacts

Medical, security and legal contacts named by the family, kept current.

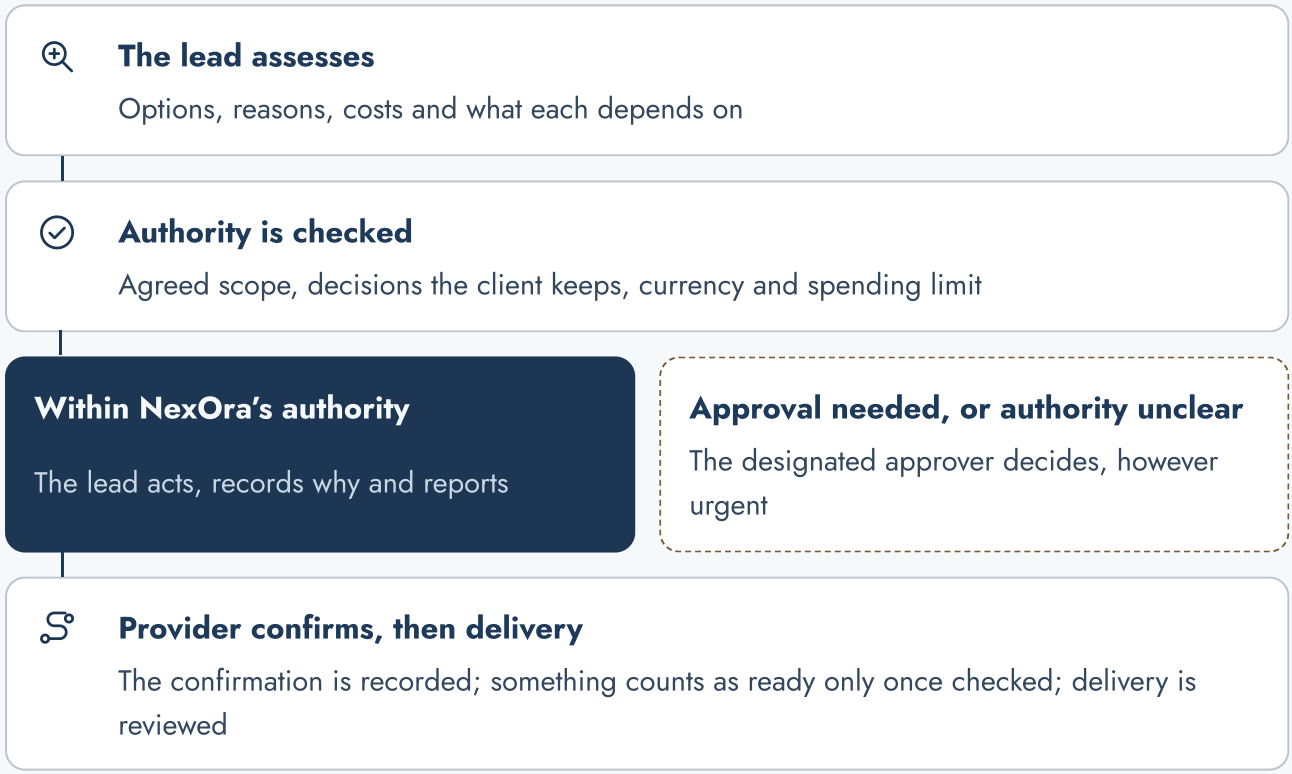
Relevant handovers

Who holds each plan at each hour, and when it passes between lead and backup.

These checks use information from qualified providers and advisors. They are not round-the-clock intelligence monitoring, and they cannot guarantee passage through restricted or disrupted areas.

Decisions & authority

NexOra acts on its own only within the agreed scope and spending limits. Decisions the client has kept for itself, anything outside the scope, and anything where authority is unclear go to the designated approver, the person the client has authorised to decide, however urgent and whatever the cost. Each recommendation states the options, the reasons, the costs, what it depends on and the decision needed.



Approval, the provider's confirmation, checked readiness and completed delivery are separate stages. A no-cost option may still need approval. The application records decisions; it does not grant authority.

What each recommendation sets out

Options are weighed against the client's priorities: suitability, timing, cost and what else depends on them.

Options	Reasons

A short list of suitable options, not an exhaustive one.

Why one option is recommended, and why the others are not.

Costs and trade-offs
The main costs in the agreed currency, limits on timing or availability, and what each option gives up.

Deadlines and knock-on effects
What the decision depends on, what follows from it, and when it is needed.

Decision needed
The specific choice to be made.

Who decides
The principal or designated representative, as set out in the mandate.

Continuity and discretion

The family's operating record keeps procedures, preferences, provider assessments, decisions and lessons. It helps with preparation and handovers. Who can see it, how it is shared, where it is stored and how it is returned are agreed for each engagement.

When a trusted person moves on, their practical knowledge stays in the record, so a new team member or a new season starts from what is already known.

What the record retains

- Procedures, preferences and provider terms
- Provider assessments and the reasons for each selection
- Delivery performance against the brief
- Problems and how they were solved
- Decisions and commitments, with who approved them, why, and the supporting records
- Lessons and handovers that inform future preparation and recommendations

How information is handled

Need to know
Information is shared only with the people working on the engagement.

Partner and provider briefings
Partners and providers receive only what their part requires.

The family's record

Its format and where it is stored are agreed with the family and written into the engagement terms, so it can be handed back or exported.

Access

The operating plan lists who may open the record. The designated approver approves access, and it is removed when a person's role ends.

Checks

The checks applied to providers and staff engaged through NexOra are set out in the engagement terms.

Communications

Channels and device practices are agreed with the family's own security advisors.

Ending an engagement

Records are returned or exported in the agreed format, access is removed, and how long anything is kept follows the agreed terms and the law.

Disclosure of NexOra's involvement

Whether NexOra's involvement is disclosed, and to whom, is agreed with the client at the start of each mandate.

Private relationships

Client identities and personal arrangements remain private. Relevant team and provider introductions are made privately; selected institutions and occasions are named in assignment descriptions.

See the operating record excerpt.

Reference examples

Supporting examples for the principles above. They are hypothetical and are not accounts of past NexOra engagements.

Movements and field coordination

Composite movement day and the preparation diagram

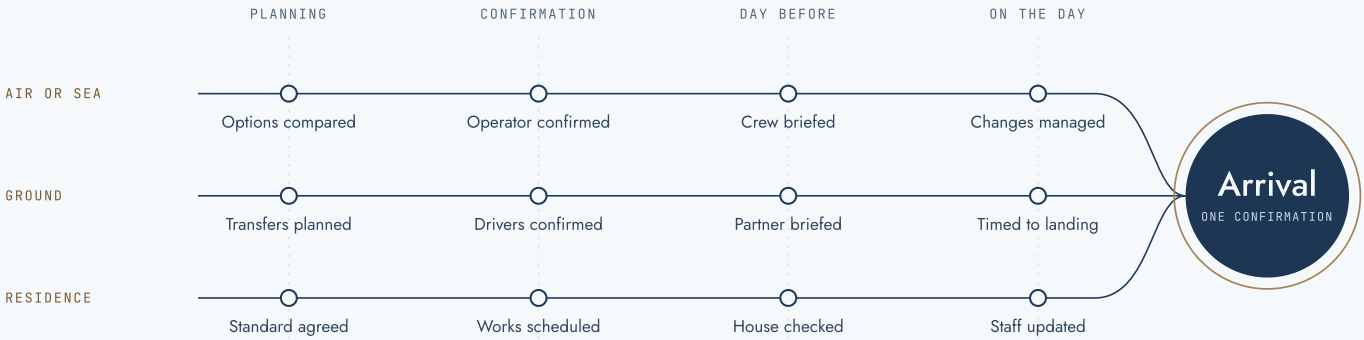
ILLUSTRATIVE EXAMPLES · FICTIONAL DATA

A coordinated movement day

This example assumes extended cover and named handovers agreed for the day; it is not standard availability. Places appear among the network cities on the network map.

05:40	BACKUP · OLBIA	Overnight weather reviewed; tender transfer moved forward forty minutes within pre-approved authority; captain and local partner informed.
07:00	BACKUP → LEAD	Named handover. Morning note to the office: three movements, one decision required.
08:15	PARTNER · OLBIA	Summer house checked against its readiness brief; pool service outstanding, reported to the lead.
08:30	LEAD	Elevated priority: pool contractor booked within pre-approved limits; house manager informed.
10:30	LEAD · GENEVA	Departure for Olbia confirmed; crew briefed from the family's recorded preferences.
12:05	LEAD · LONDON	Routine: a school asks for a parent meeting; two times offered, one confirmed by the office.
13:20	PARTNER · OLBIA	Arrival met; tender transfer on schedule; confirmation sent to the lead.
18:00	LEAD → BACKUP	Named handover: open items and the evening's movements passed to the backup.
19:45	BACKUP · DUBAI → OLBIA	Urgent: a guest's connection from Dubai is delayed. An approved alternative is booked within the pre-agreed limit; the house and office are informed.
23:30	BACKUP	Day entered in the operating record; three preferences updated.

One movement, connected preparations



Operating record

An illustrative excerpt

ILLUSTRATIVE EXCERPT · FICTIONAL DATA

Operating record excerpt

SPRING	Principal prefers the north bedroom at the mountain house in March, for the morning light. Carry forward to spring stays.
APRIL	Second daughter now carries her own physician's letter on journeys; copy held by the office; renewal due before autumn term.
MAY	Captain notes the family prefers quieter anchorages in the evening; reflect in itinerary planning.
JUNE	After an urgent delay, the ground provider performed well; the office approved them as first choice for the region.

Online: https://nexoraprivateoffice.com/private-operations/ · https://nexoraprivateoffice.com/selected-assignments/

PRIVATE OPERATIONS

What NexOra delivers

NexOra leads and coordinates the work across six areas. Each assignment combines the areas it needs, with clear responsibilities for NexOra, your own team and the specialists appointed. Defined projects and family programmes are scoped separately (see Engagement).

Six areas of private operations

Each area shows what NexOra does and where specialists remain responsible. Mobility Operations connects the movements and the arrivals; Global Field Operations prepares and checks the work on the ground.

A Operational Oversight & Reporting

A clear view of progress, spending and provider performance. **Reporting** shows where things stand and what has gone wrong. Where reliable data exists, **analysis** shows patterns, alternatives and recommended changes. Provider contracts are reviewed before renewal.

SPECIALIST RESPONSIBILITY Aviation and maritime cost and usage analysis is done with qualified specialists. Financial, tax and investment advice stays with the family's advisors. Recommendations state their assumptions; savings are not guaranteed.

Scope and outputs

SCOPE

- Provider performance and renewal reviews
- Approved budgets, commitments and invoices reported separately
- Usage and cost patterns, where reliable data exists
- Aircraft and yacht management-company reporting, summarised for you
- Yacht budgets and maintenance summarised
- Open preparations, problems and readiness tracked
- Recommendations with costs, alternatives and the decision needed
- Operating records and handovers

TYPICAL DELIVERABLES

Operational reports, summaries of aircraft and yacht management-company reporting, provider performance and renewal reviews, and specialist-supported analyses where commissioned.

Within this area: Aviation reviews · Provider performance · Operating expenditure · Recommendations and decisions

Insurance renewals: Residence & Asset Stewardship →

Aviation arrangements reviewed

Specialist-supported comparisons of charter programmes, fractional ownership and aircraft ownership, assessed against the family's actual flying requirements. Following the client's decision, NexOra coordinates the operational next steps with the appointed aviation specialists and management company.

Specialists Qualified aviation consultants and, once appointed, the management company and operator.

NexOra coordinates

- On-demand charter and jet-card programme comparisons
- Fractional or shared-access arrangements
- Ownership alternatives
- Usage, routes and availability requirements
- Operating costs and relevant contractual conditions
- Findings and recommendations from qualified aviation specialists

You receive A comparison with the specialists' findings, a recommendation for your decision and, once approved, a coordinated plan for the next steps.

Financing, tax, ownership structures, registration and technical assessments remain with the relevant qualified providers and advisors. Operators remain responsible for operating the aircraft. No savings are promised.

Selected assignment: comparing aviation options →

Movements themselves: Mobility Operations →

Technology specialists, implemented

Household and office technology projects taken from requirements to completed implementation with the appointed specialists.

Specialists Technology, network and audio-visual specialists appointed for the project.

NexOra coordinates

- Requirements agreed with the family or office
- Specialist appointments
- Implementation priorities and responsibilities
- Progress tracked and reported

You receive A requirements brief, an implementation plan and progress reporting.

Separate from NexOra's own application and dashboard. Technical design and installation stay with the appointed specialists.

Clear commitments. Traceable decisions.

NexOra connects provider commitments, approved budgets and supporting records, giving the family and its finance team a clear view of what has been agreed and what requires attention.

Specialists The family's authorised finance team or office.

Reported separately for each assignment

- **Approved budget:** what the client has authorised
- **Amount committed:** what has been agreed with providers
- **Amount invoiced:** what providers have billed, with supporting records
- **Outstanding approvals and actions:** what still needs a decision or follow-up

You receive A commitments schedule and supporting records for the finance team's approval and payment.

A commitment is not a payment. Payment status comes from the authorised finance team; payment release, accounting and tax remain with the appointed professionals.

Specialist recommendations carried into action

Approved actions from aviation, security or other specialist reviews are coordinated with named owners, deadlines and progress reporting.

Specialists The specialist who made the review, and the providers appointed to carry out the actions.

NexOra coordinates

- Operational actions and dependencies clarified from the findings
- Owners and deadlines agreed
- Progress tracked and outstanding work reported

1. The specialist provides findings
2. NexOra clarifies the operational actions and dependencies
3. The authorised representative approves where required
4. Appointed providers implement
5. NexOra tracks progress and reports outstanding work

You receive An action tracker linking recommendations, responsibilities, deadlines and decisions.

NexOra does not take on the specialist's professional responsibilities, and no review eliminates risk or guarantees an outcome.

Illustrative scenario: a provider keeps falling short →

Selected assignment: privacy recommendations carried into action →

B Residence & Asset Stewardship

Residence arrangements and selected asset-related work, coordinated with the house managers and management companies responsible for them.

SPECIALIST RESPONSIBILITY Management companies and specialists keep responsibility for technical management, safety, operating the asset and regulated advice. Aircraft and yacht movements sit under Mobility Operations. Household staff are employed by the family's employer of record; qualified contractors carry out works.

Scope and outputs

SCOPE

- Seasonal opening and closing
- Readiness standards and pre-arrival checks
- Works coordination
- Procurement and provider renewals
- Refit progress against scope, budget and timeline, with any changes that need approval

TYPICAL DELIVERABLES

Readiness standards and briefs, works and maintenance tracker, provider and renewal register, and asset inventories.

Within this area: Residence preparation · Works and maintenance · Collections · Specialist insurance and valuation coordination

Preparation beyond the next arrival

Maintenance schedules, specialist care instructions and provider responsibilities retained alongside readiness checks, supporting continuity between visits.

Specialists	House managers, contractors, manufacturers and specialist conservators, each for their own equipment or objects.

NexOra coordinates

- Preventive maintenance calendars
- Contractor and provider responsibilities
- Specialist instructions for furnishings, equipment and collections
- Warranty, renewal and service dates
- Outstanding issues and readiness checks
- Relevant handover information

You receive A maintenance calendar, provider register and current care instructions.

Technical instructions come from the relevant manufacturers, managers and specialists. NexOra does not certify technical condition.

Selected assignment: maintenance planned between visits →

Recruitment and transition coordination

Operational requirements developed with the client and specialist recruiters, with onboarding and handovers coordinated around the role.

Specialists Specialist recruitment agencies and, where commissioned, screening providers; the employer's own advisors.

NexOra coordinates

- Household and office roles, including assistants and chiefs of staff
- Role briefs and responsibilities
- Coordination with specialist recruitment agencies
- Interview arrangements and candidate information
- Specialist screening and background checks where commissioned
- Onboarding, procedures and practical handovers

You receive A role brief, an agreed recruitment timetable and a written handover for the person appointed.

NexOra is not the employer, payroll provider or employment-law advisor. Contracts, payroll, immigration and recruitment responsibilities remain with the appointed specialists and the employer of record. Recruitment assignments are agreed separately unless your agreement includes them.

Continuity through a staff transition →

Collections beyond the residence

Loans, exhibitions and collection movements coordinated with registrars, institutions, specialist shippers and insurance advisors.

Specialists Registrars, fine-art shippers and storers, institutions, valuers and insurance advisors.

NexOra coordinates

- Registrar-maintained inventories
- Condition documentation
- Specialist packing, storage and shipping
- Loan and exhibition requirements
- Receiving arrangements
- Specialist valuation reviews, with insurance coordinated as below
- Relevant documentation coordinated with qualified advisors

You receive A current inventory record, a movement plan for each loan or transfer, and the related documentation in one place.

NexOra does not authenticate, conserve, appraise or insure works itself; qualified specialists do.

Selected assignment: moving a collection between locations →

Institutional relationships and hosts: Private Engagement →

Specialist insurance coordination

Renewal information, asset changes and supporting documents coordinated with appointed brokers and advisors.

Specialists Appointed insurance brokers and qualified advisors, with the asset manager and registrar.

NexOra coordinates

- Relevant operational information gathered, where commissioned
- Renewal dates and required documents tracked
- Specialist reviews coordinated following asset changes
- The client, asset manager, registrar and appointed broker connected
- Actions arising from the specialist's review tracked

You receive A renewal timetable, supporting records and an action list for the appointed advisors.

Brokers and qualified advisors assess coverage and recommend insurance. NexOra coordinates information and actions; it does not underwrite, sell or independently recommend insurance.

C Mobility Operations

NexOra coordinates air, sea and ground movements as one plan. Operators, routes, timing and the arrangements at the destination are considered together, with back-up options ready and changes handled within agreed limits.

SPECIALIST RESPONSIBILITY Aircraft and vessel operation, safety and regulatory compliance remain with licensed operators. NexOra coordinates the arrangements, tracks what each step depends on and reports to the client. Protective arrangements remain with licensed security providers.

Scope and outputs

One movement, connected preparations, a diagram on Our Approach, shows how air or sea, ground and residence preparations converge on one confirmed arrival.

SCOPE

- Coordination with aircraft and yacht operators and management companies
- Operator options compared before each commitment
- Multi-country movements planned as one sequence
- Ground and arrival arrangements timed to actual movements
- Receiving teams and residences prepared against the confirmed arrival plan
- Maritime itineraries, tender and shore transfers aligned with the family calendar
- Entry, visa and sanctions questions referred to qualified advisors before plans are finalised
- Back-up options prepared in advance
- Changes handled on the day, within agreed limits
- Movement patterns and costs reviewed each season

TYPICAL DELIVERABLES

Movement plan, comparison of options, provider briefs, confirmations, back-up plans and approval requests.

Within this area: Private aviation · Maritime arrangements · Ground and receiving coordination

Charter, fractional and ownership reviews →

Management-company reporting: Oversight & Reporting →

Movements with medical or care requirements → **Selected assignment: a milestone gathering →**

D Global Field Operations

Local preparation and follow-through, connecting your NexOra lead with the people responsible on the ground.

SPECIALIST RESPONSIBILITY Airport and port assistance is provided by authorised providers within each facility's rules. It does not bypass customs, immigration or security requirements. Local licensing and regulation remain with the providers concerned.

Scope and outputs

SCOPE

- Local preparation against the plan
- Provider and staff briefings, limited to what each part requires
- Arrival support, with residence and arrival checks against the readiness brief
- On-site coordination where arranged
- Key preparations checked before the family relies on them
- Updates to the lead, and problems raised quickly

TYPICAL DELIVERABLES

Local briefs, check records and an issue log, included in the operational report.

Within this area: Local preparation · Readiness checks · Medical logistics · Specialist follow-through

Care arrangements, connected

Practical arrangements coordinated with the family's appointed care providers, including appointments, movements and support at home. Clinical decisions remain with qualified professionals.

Specialists The family's appointed healthcare and care-management providers and, where appointed, medical-assistance providers.

NexOra coordinates

- Appointment scheduling and accompanying-person arrangements
- Coordination with an appointed care-management provider, where commissioned
- Coordination with medical-assistance providers, where appointed
- Movements, ground and receiving logistics
- Accommodation where relevant
- Practical access and provider schedules at home
- Communications with authorised family representatives
- Operational handovers between relevant teams

You receive A care-coordination plan with named responsibilities and agreed communications.

NexOra does not assess clinical needs, choose treatment, provide nursing or medical care or give medical advice. It does not operate medical evacuation and cannot guarantee emergency availability or access to particular physicians or facilities. Availability follows the agreed coverage, and medical information is handled only through authorised arrangements for the engagement.

Selected assignment: specialist care arranged at home →

Security awareness and follow-through

Specialist-led security awareness and implementation coordination. Qualified providers lead assessments and training. NexOra coordinates appointments, approved practical actions and follow-up with the relevant teams.

Specialists Licensed security providers and risk advisors appointed for the assignment.

NexOra coordinates

- Appointments for assessments and training
- Follow-up with the relevant teams
- Approved practical actions, with owners and deadlines

You receive Approved actions tracked to completion, with outstanding items reported.

NexOra does not carry out security assessments itself, and the application is not a security service.

How recommendations are carried into action →

Selected assignment: privacy recommendations carried into action →

E Private Engagement & Institutional Access

Visits and engagements with institutions, collections and private hosts. The purpose is agreed first, and every arrangement is made on the host's terms.

SPECIALIST RESPONSIBILITY Institutions and hosts decide what they can offer and when. Access is requested through relationships and is never guaranteed; it gives no special legal treatment or unrestricted entry.

Scope and outputs

SCOPE

- Cultural and institutional visits
- Private collections and archives, including authorised archive visits for family-history work
- Craft and heritage settings
- Private dining and hosting
- Milestone occasions
- Relevant introductions and specialist-led visits

TYPICAL DELIVERABLES

Engagement plan, host briefs, protocol notes and a short review afterwards.

Within this area: Institutions and archives · Private hosting · Significant occasions · Specialist introductions

Specialist sourcing, clearly briefed

Approved searches and appointments coordinated through relevant experts, with requirements, commercial terms and decisions presented clearly.

Specialists The relevant expert for each search, and qualified specialists for authentication and condition.

NexOra coordinates

- **Sourcing a specialist:** the right expert found, assessed and briefed
- **Sourcing an object through a specialist:** the search is carried out by the appointed expert
- **Your purchase approval:** nothing is bought without it
- **Authentication and condition:** assessed by qualified specialists, not by NexOra

You receive A search brief, the options with their commercial terms, and your recorded decision.

Availability is never guaranteed.

Collection movements and loans →

F Family Programmes & Cultural Continuity

Programmes that connect family heritage, learning and interests across generations, with goals agreed first. Each is scoped separately around the family's objectives, delivered with historians, educators and hosts, and followed by reflection and agreed next steps.

SPECIALIST RESPONSIBILITY Historians, archivists, educators and facilitators lead their disciplines; remote programmes run only through qualified operators. Programmes are not psychological assessments and do not certify readiness for succession.

Scope and outputs

Journeys and occasions can carry a family's history, interests and commitments from one generation to the next. Each programme is scoped as a separate project with its own plan and review.

PROGRAMME PRINCIPLES

Purpose first

The family agrees what the programme is for before any destination is chosen.

Hosts as participants

Communities, archives, conservation bodies and institutions take part with their own priorities, on their own terms.

Qualified facilitation

Next-generation programmes are led by qualified educators or facilitators, with suitable activities and guided reflection.

Delivery and review

A practical plan for movements, hosting and safety, and a review afterwards kept in the operating record.

Programmes are not assessments. NexOra does not evaluate judgment, character or readiness for succession.

SCOPE

- Multigenerational heritage programmes
- Coming-of-age and milestone programmes
- Conservation engagement
- Next-generation programmes
- Aviation and maritime ownership education through specialists
- Family retreats and significant occasions, with independent facilitators where appropriate
- Agreed programme objectives, reflection and follow-up

TYPICAL DELIVERABLES

Programme objectives, delivery plan, host and facilitator briefs, and a written follow-up kept in the operating record.

Within this area: Heritage and family history · Education pathways · Conservation · Philanthropic engagement · Coming of age & rites of passage · Family milestones

Coming of age & rites of passage

Programmes marking a passage into adulthood through practical challenge, cultural engagement and time with experienced mentors, shaped around the family's purpose and the participant.

RELATED EXPERIENCE: **Madagascar →** **Mongolia →** **Bhutan →** **Shaolin →**

Education pathways, coordinated

School and university decisions supported by education specialists, with visits, application milestones and related arrangements coordinated around the family's timetable.

Specialists Education consultants, and tutors or test-preparation specialists where appointed.

NexOra coordinates

- School and university advisory appointments
- Specialist-led shortlists reflecting the student's needs
- Visits, interviews and application milestones
- Coordination with tutors or test-preparation specialists where appointed
- Related movement and relocation arrangements

- Handover of relevant information between authorised participants

You receive An education-coordination brief, specialist responsibilities and an application timetable.

Education consultants guide academic recommendations and applications. Institutions make admissions decisions. NexOra coordinates the practical work and does not guarantee acceptance.

Selected assignment: a school place in the UK →

Family history, preserved

Historians, genealogists and archivists brought together around an agreed brief, connecting research, interviews and existing records into a lasting family resource.

Specialists Historians, genealogists, archivists and, for agreed books, films or digital archives, production specialists.

NexOra coordinates

- Specialist research briefs
- Archive enquiries and authorised visits
- Interviews and oral-history coordination
- Organisation of existing family material
- Production coordination for agreed books, audio, films or digital archives
- Permissions, review stages and access arrangements

You receive A research brief, coordinated contributions and the agreed historical record.

Specialists remain responsible for their research and conclusions.

Host and archive arrangements: Private Engagement →

Selected assignment: a family story preserved → **Selected assignment: the Palio in Siena →**

Philanthropic activity carried through

Visits, meetings, specialist contributions and follow-up coordinated around the family's philanthropic priorities. Host-led encounters help family members understand an organisation's priorities before considering support.

Specialists Participating organisations and hosts, and the family's qualified philanthropy advisors.

NexOra coordinates

- The purpose agreed with the family and relevant advisors
- Participating organisations and hosts coordinated
- Meetings, visits and practical arrangements prepared
- Specialist briefings connected with programme activities
- Recipient communications and information requirements
- Agreed follow-up actions, responsibilities and follow-up reporting

You receive A programme brief, coordinated schedule and follow-up record.

Hosts take part on their own terms, and access is never guaranteed. Funding and governance decisions remain with the family; nonprofit due diligence, foundation governance, grant administration and compliance remain with its qualified advisors and appointed specialists. No measurable impact is promised.

Illustrative: understanding before support →

How programmes are delivered →

Responsibilities by domain: what NexOra coordinates and what specialists retain

RESPONSIBILITIES BY DOMAIN

DOMAIN	NEXORA COORDINATES	APPOINTED SPECIALIST RETAINS RESPONSIBILITY
Aviation	Itineraries, comparison of operator options, confirmations, crew briefings from recorded preferences, and approved alternatives.	Operator safety and regulatory standing; due diligence by a specialist aviation consultant when the family requires it.
Maritime	The vessel's itinerary against the family calendar, tender and shore transfers, and communication between captain, management company and office.	Vessel operation, crew employment, flag and safety compliance remain with the captain and management company.
Ground and arrival	Transfers, drivers and arrival arrangements through network partners, timed to actual arrivals; entry and documentation logistics coordinated with qualified advisors.	Airport and port assistance by authorised providers; immigration and customs decisions by the authorities; visa advice by qualified advisors.
Residences	Readiness standards, seasonal opening and closing, pre-arrival preparation and post-departure reset, supplier calendars, works tracking, inventories and provider reviews, with the house manager.	Household staff are employed and managed as the family decides; works are carried out by qualified contractors.
Protection	Sharing itineraries with the family's security advisors on a need-to-know basis, and the logistics of what they recommend.	Risk assessment and protective services by licensed providers. NexOra is not a security operator.

DOMAIN	NEXORA COORDINATES	APPOINTED SPECIALIST RETAINS RESPONSIBILITY
Medical coordination	Appointment and transport logistics for care, medical-assistance contacts in movement plans, and physicians' details kept current, with consent.	Medical advice, care, evacuation decisions and records remain with clinicians and medical-assistance providers. NexOra does not provide medical services.
Education	School calendars, visits, application logistics and transitions within the family calendar.	Educational advice from schools and consultants; residency and documentation questions from counsel.
Collections	For art, wine and other collectibles: inventory and documentation kept with the registrar, storage-condition checks through appropriate providers, moves, loans and viewings, and scheduling of valuation and insurance reviews.	Handling and custody by specialist logistics firms; authentication and valuation by qualified experts; cover by insurers; title by counsel. NexOra does not authenticate, value or insure.
Cultural access and hosting	Private cultural visits, institutional introductions, dining and hosted occasions, milestone celebrations and specialist-led experiences, arranged through relationships.	Hosts decide what they can offer and when. Every visit is subject to their agreement.
Relationships	A register of the family's relationships with institutions and providers, kept with the operating record.	Relationships belong to the family. Introductions are made only with its agreement.

Specialist Selection & Oversight

Specialist expertise, coordinated through delivery. NexOra identifies suitable providers, connects their responsibilities and follows the agreed work through. Your named lead keeps you informed and brings decisions to the appropriate approver. Access to expertise is the starting point. NexOra coordinates the agreed assignment after the provider is appointed. Past experience informs the choice; suitability is checked again for every assignment.

- **Specialists selected for the assignment.** Relevant experience, credentials and commercial terms assessed against your requirements.
- **Connected with your existing team.** Providers briefed around clear responsibilities, reporting lines and approval arrangements.
- **Delivery followed through.** Progress, outstanding actions and changes tracked by your named lead.
- **Knowledge carried forward.** Decisions, provider performance and practical lessons retained for future assignments.



Six checks

CHECK 1

Fit for the assignment

Scope, location, timing and the standards the work requires.

CHECK 2

Relevant credentials

Licences, qualifications and references that matter for the work.

CHECK 3

Commercial terms

Provider identity, credentials, scope, terms and responsibilities are confirmed, and later changes to provider details are checked, with discrepancies referred before further action. Changes to provider payment instructions are referred to the authorised finance team for verification through an established contact before payment is released. NexOra accepts no provider commissions or referral payments; any material affiliation or ownership interest is disclosed before the client commits.

CHECK 4

Brief and readiness

A written brief sets scope and standards; preparations are confirmed before the family relies on them.

CHECK 5

Delivery

Progress is followed against the brief, and problems are reported to the lead and the client.

CHECK 6

Performance and learning

Results and lessons are recorded after each assignment to inform future choices.

Assessment reduces uncertainty; it does not remove each provider's own responsibility or every risk.

Relationship is not appointment

Established relationships

Providers NexOra already knows and has worked with. A relationship is a starting point, not a commitment for any particular mandate.

Assessed for an assignment

Providers reviewed for a particular assignment, using the selection process above.

Appointed for the work

Providers engaged with the client's approval, briefed in writing on their responsibilities and reviewed after delivery.

Provider standards, performance reviews, renewals and comparable quotations

The lead tracks what each provider has committed to, reviews their work against agreed standards and brings service problems, renewal decisions and alternatives to the client.

Selection criteria

Agreed with the client for each category of provider, and recorded with each choice.

Commitments and standards

What each provider has undertaken, and the standard their work is reviewed against.

Performance and incident reviews

On the agreed cycle and after any incident, with the provider's response recorded.

Contracts and renewals

A calendar of terms and renewal dates, so options are prepared before a contract rolls over.

Comparable quotations

Obtained where the market allows a fair comparison. Many bespoke services have no meaningful benchmark, and the report says so.

Recommendations

To keep, replace or renegotiate. Appointing, dismissing and spending follow the client's approval rules.

ILLUSTRATIVE EXAMPLES

How a mandate applies

Five hypothetical examples across the six areas, showing how the work is led and coordinated. They are not accounts of past engagements, and no outcomes are claimed.

A multi-country movement

Mobility · Field operations

Three generations move between New York, Florence and Paris over ten days. The lead compares aviation options with the operator, plans ground transport and arrangements at each stop, briefs each host, and keeps a back-up plan for weather or schedule changes. Preparations are checked and confirmed to one lead before departure.

A provider decision supported by analysis

Reporting · Mobility

Charter spending has risen for two seasons. With an aviation specialist, NexOra compares how the aircraft is actually used with ownership and charter alternatives, using reliable data and stating its assumptions. The designated approver decides.

A yacht refit review

Assets · Reporting

Before a winter refit, NexOra works with the management company to set out scope, budget and timeline, follows progress against the yard schedule and reports changes and decisions needed to the client. Technical supervision stays with the management company and surveyor.

A residence and staff transition

Residences · Continuity

When a house manager hands over, the lead holds the transition plan: procedures and provider terms are reviewed with the outgoing manager, the incoming manager is briefed from the record and open items are followed until they are done. Employment remains with the family's employer of record.

A heritage programme

Programmes · Institutional access

A family wishes to document its history across two countries. NexOra agrees objectives with the family, works with historians and archives on their terms, plans each stage to suit every generation, and arranges a reflection session and written follow-up.

Selected Assignments

Selected NexOra assignments across private operations, international coordination and family programmes: 125 residences supported, 71 family programmes delivered and 620 private occasions coordinated. Each assignment is described in full at nexoraprivateoffice.com/selected-assignments.

Operations & Continuity

- **A family relocation to Hong Kong** Relocation · Residences
- **A London residence, renovated and run** Residences · Continuity
- **Comparing aviation options** Decision support · Mobility
- **Connecting aircraft, ground and vessel movements** Mobility · Field operations
- **Assessing a change to a yacht refit** Asset coordination · Reporting
- **Moving a collection between locations** Collections · Specialist logistics
- **Preserving continuity through a staff transition** Operational continuity
- **Privacy recommendations carried into action** Specialist coordination · Reporting
- **Maintenance planned between visits** Residence operations · Continuity
- **A house prepared for the season** Residences

Private Occasions & Access

- **Replacement hospitality for twenty cricket guests** Occasions · Ground arrangements
- **Antigua Sailing Week, from a private yacht** Maritime occasion
- **A private opera evening in Ravello, continuing to Capri** Private performance · Maritime
- **Jazz in New Orleans, from rehearsal to performance** Private access · Music

Family Programmes & Cultural Continuity

- **A school place in the UK** Education · United Kingdom
- **Inside the Palio, with a contrada** Heritage and living tradition · Siena
- **Inside a living design archive** Institutional access · Florence
- **Conservation understood in the field** Conservation engagement · Kenya
- **A rainforest expedition in Madagascar** Expedition · Madagascar
- **Understanding the operation behind the Canal** Specialist learning · Panama
- **Behind the stage at Teatro Colón** Institutional access · Buenos Aires
- **A Christmas for every generation** Family gathering · Lapland
- **A milestone gathering, coordinated across generations** Family programmes · Mobility
- **A family story preserved for the next generation** Family history · Cultural continuity

Further family programmes took place in Mongolia, Bhutan, China, Georgia, Rwanda, New Zealand, Dominica, Morocco, Namibia.

Illustrative scenarios (not accounts of completed engagements): A provider keeps falling short; An aircraft becomes unavailable; A history across two countries; Understanding before support.

NETWORK

Expertise connected. Delivery coordinated.

NexOra combines established specialist relationships with local knowledge and cultural understanding. Providers are selected for the assignment, with clear briefs and agreed standards guiding delivery across locations.

- **Selected with care.** Providers are assessed for relevant experience, credentials, suitability and the requirements of the assignment. Established relationships inform the selection; each appointment is considered on its own merits.
- **Coordinated through delivery.** Your NexOra lead connects the appointed providers, clarifies responsibilities and keeps preparations, changes and decisions aligned with the agreed plan.
- **Continuity across your arrangements.** Plans, preferences, provider commitments and decisions remain connected across people and places, giving you a clear view of the work and preserving knowledge for what comes next.

Established relationships with 380 partners in 80 countries. Availability and suitability are confirmed for each assignment; partners are not NexOra offices or employees.

Where the network operates



A selection of the cities where NexOra's partner network operates, across six continents.

Network cities by region

EUROPE

London, Paris, Geneva, Zurich, Milan, Monaco, Olbia, Rome, Madrid, Lisbon, Vienna, Athens, Stockholm, Istanbul

MIDDLE EAST

Dubai, Doha, Riyadh

AFRICA

Marrakech, Cairo, Lagos, Nairobi, Cape Town

ASIA

Mumbai, Bangkok, Singapore, Hong Kong, Shanghai, Tokyo, Bali

AUSTRALIA AND NEW ZEALAND

Sydney, Melbourne, Auckland, Queenstown

NORTH AMERICA

Vancouver, Los Angeles, Aspen, Toronto, New York, Miami, Mexico City

SOUTH AMERICA

Lima, Rio de Janeiro, São Paulo, Santiago, Buenos Aires

The network at work

ILLUSTRATIVE EXAMPLES

LONDON

A private visit to an institution's archive is arranged with its curator, on the archive's terms and timetable.

OLBIA

Captain, management company and local team plan the yacht's programme and shore transfers around the family's schedule.

GENEVA

Before a charter is recommended, an aviation specialist reviews two operators against the requirements; the findings support NexOra's recommendation to the client.

Twelve specialist categories

Twelve specialist categories support the six service areas. Providers are assessed and appointed for the needs of each assignment. Open a category for its description.

Private Aviation

Licensed air carriers, aircraft management companies, flight planning and operational support specialists, private terminal operators, charter and shared-access programme providers, and qualified aviation consultants.

Yachting & Maritime

Yacht management companies, licensed charter operators, captains and crew agencies, port and marina agents, and refit yards.

Ground & Arrival

Airport handling and meet-and-assist teams, chauffeured transport, specialist secure transport, and local operational coordinators.

Residences & Estates

Estate and residence managers, specialist recruitment agencies, technical and maintenance firms, and interior and landscape specialists.

Collections & Specialist Assets

Art advisors, registrars and conservators, fine-art logistics, storage, and loan and exhibition specialists, and specialists in classic cars, wine and jewellery.

Private Hosting & Hospitality

Private estates and villas, selected hotels and members' clubs, private chefs, and production teams for hosted occasions.

Institutions & Hosts

Museums, archives, foundations and universities, alongside curators, custodians and private hosts supporting authorised engagements.

Historians & Programme Specialists

Historians, genealogists, archivists, educators and mentors, alongside specialists supporting heritage, next-generation, philanthropy and conservation programmes.

Protection & Medical Assistance

Licensed security providers, risk advisors and security-awareness trainers, mobility risk specialists, physicians, appointed medical-coordination providers, and medical-assistance and air-ambulance providers.

Legal & Insurance Specialists

Aviation, maritime and property counsel, immigration and visa advisors, and specialist insurance brokers covering aircraft, yachts, collections and international mobility.

Technical, Valuation & Operational Analysis

Marine surveyors, aircraft technical consultants, building engineers, appraisers and valuers, and specialists in utilisation, operating costs and procurement. Customs brokers and freight forwarders support relevant cross-border movements.

Privacy, Protocol & Language

Cybersecurity and privacy advisors, specialist due-diligence firms, protocol advisors, and interpreters and translators.

Each provider retains responsibility for its specialist work. NexOra coordinates the agreed assignment and reports to the client. Provider suitability, availability and institutional access are confirmed for each assignment; see how providers are selected.

Four further examples of the network at work

Geneva, Dubai, New York, Singapore

ILLUSTRATIVE EXAMPLES Hypothetical; not accounts of past engagements.

GENEVA → OLBIA

A family movement

The family flies to the summer residence. Operator, ground transfer and house are confirmed to one lead before departure (see the composite movement day on Our Approach).

DUBAI → OLBIA

A delayed connection

A guest's connection is delayed. An approved alternative is booked within the pre-agreed limit and the house is given the new arrival time. The decision is set out in the illustrative report on the homepage.

NEW YORK

A private viewing

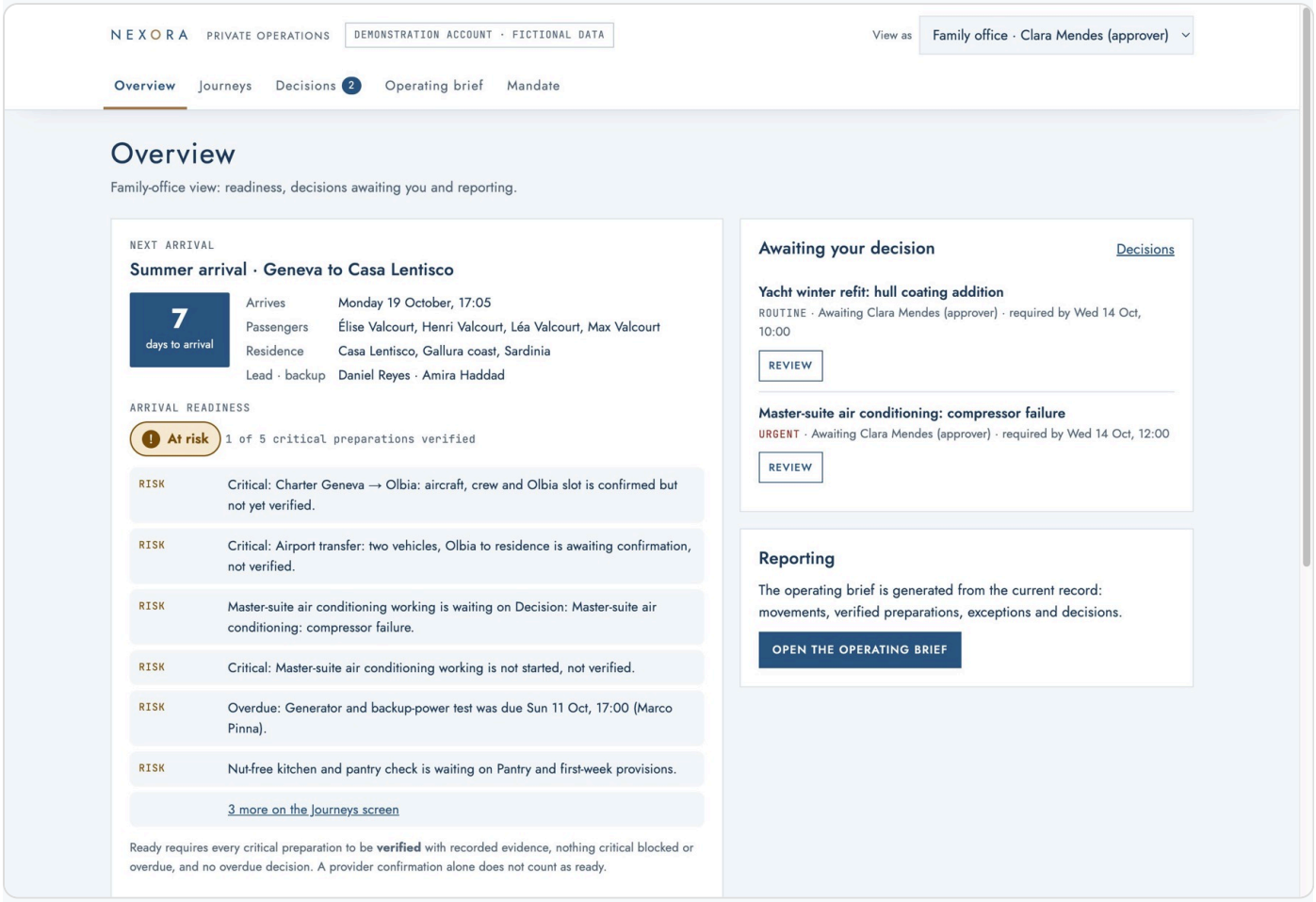
A private viewing is arranged with the gallery. The registrar supplies the condition report in advance.

SINGAPORE

A relocation begins

A family member's move begins. The new residence's readiness brief is drafted from the existing record (see the relocation report item on Client Application).

Online: https://nexoraprivateoffice.com/client-application/



The client dashboard: readiness, decisions awaiting the approver and reporting. NexOra Private Operations · demonstration account with fictional data.

NEXORA PRIVATE OPERATIONS

A shared view of the work

The application and dashboard bring current arrangements, outstanding actions and decisions into one view. Your NexOra lead coordinates delivery; authorised users review the information and actions relevant to their role.

- **NexOra lead** assesses, recommends and coordinates
- **Client application** shows status, records, reporting and approvals

ILLUSTRATIVE SCENARIOS · FICTIONAL DATA

Mobility coordination

SITUATION

The assigned aircraft becomes unavailable before a confirmed movement.

NEXORA LEAD

Replacement options are compared, with revised timings, costs and implications for ground and receiving arrangements.

DECISION

The recommended option and any approval required are submitted to the designated representative.

OUTCOME

Following approval, the operator confirms the replacement and affected teams receive the revised movement plan.

IN THE CLIENT APPLICATION

Decisions

Options, costs, the recommendation and the approval record.

Journeys

Revised movement details and the status of critical receiving preparations.

Specialist assessment

SITUATION

A collection requires specialist handling and transport between two locations.

NEXORA LEAD

Providers are compared on relevant experience, handling arrangements, insurance documentation, scope and commercial terms.

DECISION

A recommendation sets out the differences, costs and appointment approval required.

OUTCOME

Following approval, the appointed specialist receives an agreed brief, responsibilities and reporting requirements.

IN THE CLIENT APPLICATION

Decisions

The provider recommendation, the reasons for it and the approval history.

Commitments

Appointment and briefing actions, with an owner, deadline and supporting records.

Programme delivery

SITUATION

A family heritage programme requires an archive visit and contributions from several specialists.

NEXORA LEAD

Host permissions, specialist briefs, timing and preparations are coordinated.

DECISION

The proposed programme, costs and outstanding permissions are presented for approval.

OUTCOME

Following approval and host confirmation, participants and specialists receive the agreed programme and responsibilities.

IN THE CLIENT APPLICATION

Decisions

The proposed programme, costs and outstanding permissions, with the approval record.

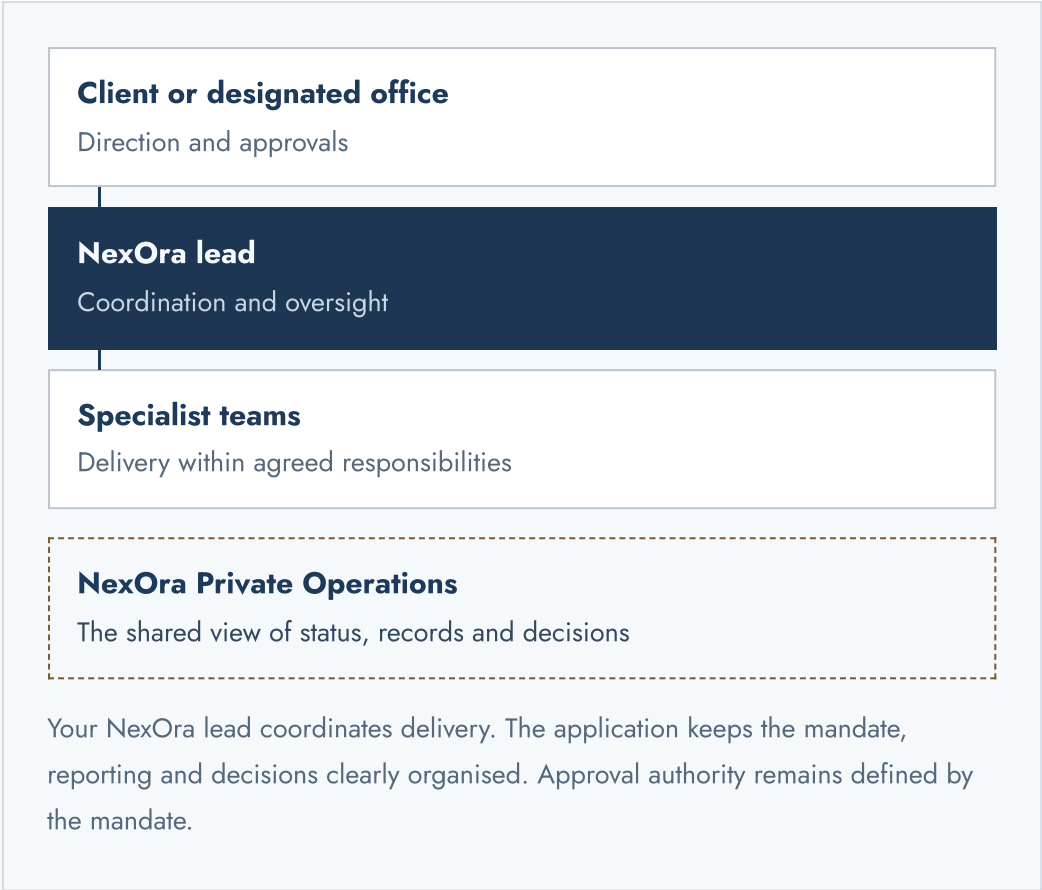
Operating brief

Decisions required and recommended next actions, ready to print or download.

SERVICE AND APPLICATION

Who does what

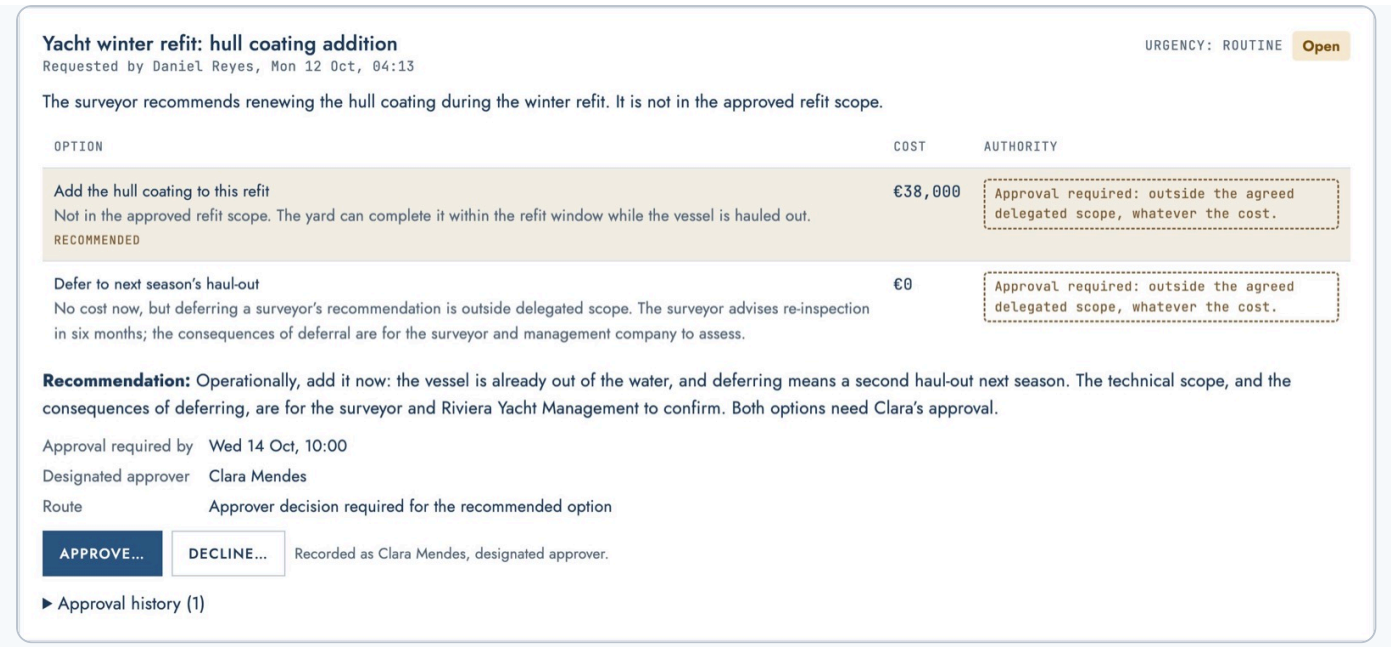
The client application gives principals and their authorised representatives one view of current movements, decisions, reports and records. NexOra does the work: it assesses, recommends and coordinates. The application shows the status, records, reports and approval requests. Each person sees what their role needs: the lead, the designated approver and, where relevant, the residence manager.



Authority comes from the mandate

Each decision shows whether NexOra may go ahead or the designated approver must decide. A low or zero cost does not make it NexOra's decision: in the example below, putting the work off costs nothing now but still needs approval, because it falls outside the agreed scope. The application records each decision; it does not grant authority.

How authority and decisions work



A decision as it appears in the application, with both options requiring approval. NexOra Private Operations — demonstration account

NEXORA PRIVATE OPERATIONS

Application functions

What the application presents, and what it does not do.

Active mandates and preparations

Movements, the preparations linked to them, owners, deadlines and what each depends on, with readiness shown as Ready, At risk or Not ready, and the reasons.

Decisions and approval records

Each decision shows its options, costs, recommendation and authority status, as set out in recommendations and approval. The designated approver approves or declines; who, when and why are recorded.

The operating brief

Generated from current records, ready to print or download.

Confirmations, checks and history

Provider confirmations, check notes and a record of activity, kept against each arrangement.

Confirmed is not the same as checked

An item counts as ready only once the required evidence or check is recorded, not when a provider reports that it is in place.

Limitations. The application does not send messages, process payments or verify providers automatically, and it has no separate programme record: programme decisions are recorded as decisions. Access arrangements and data handling are set out in the engagement terms.

Operational reporting and analysis

What the screens show

- **Current status.** Ready, at risk or open, for each arrival and decision.
- **Action owner.** The lead and backup, who raised each item and who approves it.
- **Deadline.** When each decision is needed.
- **Recommendation.** The options, their costs and the option NexOra recommends.
- **Approval requirement.** Whether an option falls outside the agreed delegated scope.
- **Decision history.** Who approved or declined, and when.

The context behind each commitment. Relevant provider information, supporting records and approval history remain connected to the assignment, so authorised users can understand the decision and follow the next action. In the application, each decision keeps its options, costs, recommendation and approval history, and providers are linked to the arrangements they serve; budgets, commitments and invoices are kept in NexOra's operating records and reported with the operating brief. It is not an accounting or investment system.

The lead writes each report from the current records: commitments, provider confirmations, check notes and decisions, in a format agreed with the client.

Where things stand, and what comes next

Progress, open items and problems; spending against approved budgets; provider performance and upcoming renewals; priorities, recommendations and decisions needed. Each report links where things stand with what needs to happen next.

Patterns and alternatives

Where reliable data exists: how aircraft and yachts are used, ownership compared with charter, yacht budgets and maintenance, and alternatives with their assumptions stated. Specialists are involved where the subject needs them.

Reporting rhythm

How often reports and planning reviews happen is agreed for each engagement.

Example reporting rhythm, from annual to daily

EXAMPLE REPORTING RHYTHM

HORIZON	FORUM	SCOPE REVIEWED	OUTPUT
Annual	Family and office	Mandate, residences, long-range calendar	Updated operating plan
Quarterly	Office	Provider performance, renewals, spending against plan	Report and decisions required
Monthly	Planning review	Calendar ahead, open commitments	Commitments list
Weekly	Operations check	Movements, readiness, open items	Week-ahead note
Daily	Morning note, on movement days	The day's movements and decisions	Running sheet

Report specimens

An operational report and an elevated exception item

ILLUSTRATIVE SPECIMENS · FICTIONAL DATA

MONTHLY REPORT · ASSETS, RESIDENCES & MOVEMENTS

ILLUSTRATIVE REPORT — FICTIONAL DATA

Operational report

COMPLETED	City residence reset after departure; winter supplier calendar issued to the estate team.
OUTSTANDING	Summer house pool service booked Thursday; confirmation due from the local partner.
SPENDING	Residence works within the approved plan. Ground transport above plan after two itinerary changes; detail attached.
RENEWALS	Housekeeping next quarter; vessel berthing agreement in the spring.
RECURRING ISSUES	Late confirmations from the city car provider, third this quarter.
DECISIONS	**1. Renew, renegotiate or re-tender housekeeping. 2. Approve a one-month trial of an alternative car provider.**
RECOMMENDED	Renegotiate housekeeping response times; run the trial; review both at the next quarterly meeting.

WEEKLY REPORT · EXCEPTION ITEM

ILLUSTRATIVE REPORT — FICTIONAL DATA

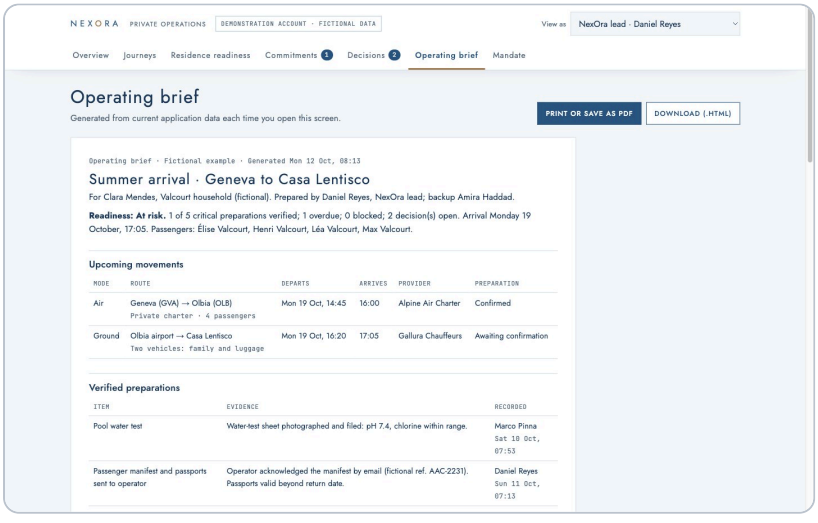
Singapore relocation · Elevated

STATUS	Lease start depends on the school confirming term dates; the shipping slot must be held by Friday.
RECOMMENDATION	Hold the slot with a flexible delivery window; ask counsel to confirm the visa timeline.
DECISION REQUIRED	**Confirm the move week.**

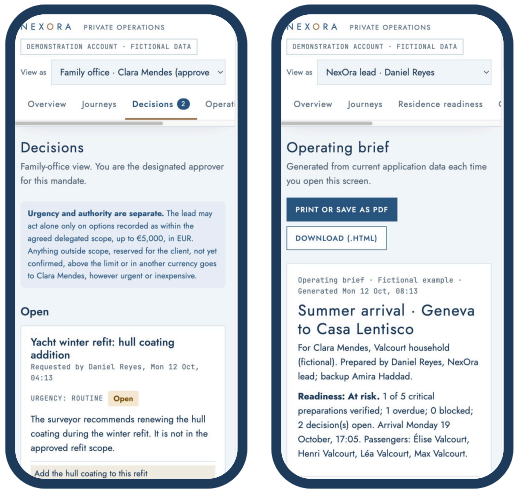
DEMONSTRATION ACCOUNT

Further application screens

Reporting and decisions as they appear on desktop and phone. More screens open from "View application screens" above.



Operational reporting



Decisions and reporting on a phone

Screens from NexOra Private Operations — demonstration account, with fictional people, places and amounts.

ENGAGEMENT

How a mandate begins, and what it produces

It starts with a private conversation about your priorities and the arrangements already in place. NexOra can be appointed by the principal, through a family office, or by the family's designated representative. Scope, authority, cover and fees are agreed in writing before work begins.

Ways to work with NexOra

Start with a specific requirement or establish continuing support. NexOra coordinates defined projects and ongoing work, with scope, responsibilities and fees agreed around the assignment.

FOR PRIVATE CLIENTS

Private Membership

A dedicated relationship, client technology and continuing coordination within an agreed scope.

FOR FAMILY OFFICES

Family Office Mandate

Operational delivery and provider oversight alongside your existing team.

FOR A SPECIFIC NEED

Defined Project

A specific assignment with its own scope, responsibilities and delivery plan. No membership needed.

A Private Operations Review is an optional way to establish priorities first. It stands on its own and is never required.

Support that evolves with your requirements

As family members relocate, residences change or new commitments arise, NexOra adapts the agreed support around your requirements. Your lead brings in the relevant specialists and agrees responsibilities, coverage and fees before additional work begins.

Getting started

Before the work starts, the essentials are agreed. This set-up is part of every engagement, not a separate service. It covers:

- Objectives and scope
- Who decides, and the approval limits
- Existing providers and their commitments
- Upcoming dates and immediate priorities
- Communication and reporting preferences
- Access arrangements for records and the client application

Private Operations Review

A focused assessment of selected arrangements, responsibilities and providers. The findings identify priority actions, who owns them, which decisions require approval and the proposed operating plan. The client receives written findings, prioritised actions, a responsibility map, a proposed operating plan and a readout.

When it helps

Responsibilities are unclear; provider issues recur; work spans more locations or teams; a key person is changing; or a relocation or significant programme is approaching.

What it clarifies

Who does what, who approves what, what depends on what, and which issues need attention first. It can cover one area, such as a residence or provider contracts, or several.

What the Review draws on

Conversations with the family office or representative and relevant staff; current responsibilities and approval rules; how movements and residences are run today; provider contracts and renewal dates; existing records and handover notes.

Next steps

The Review stands alone. Any subsequent project or ongoing mandate is agreed separately.

Scope, duration and fees are agreed in writing before the Review begins.

REVIEW OUTPUT · EXCERPT

ILLUSTRATIVE SPECIMEN

Responsibility map

AREA	ACTS	APPROVES	COVER
Summer residence opening	House manager	Office	**Not defined**
Charter bookings	Principal's assistant	Principal	**Not defined**
Provider renewals	Office finance	Head of office	Office finance

PRIORITY ACTIONS

1. Agree a written readiness standard for the summer residence.
2. Name cover for movement arrangements when the assistant is away.
3. Review two maintenance contracts before they renew.

What the work produces

Each engagement agrees what it will produce. These documents record and support the work; the service itself is the leadership, judgment and delivery behind them. Where NexOra is appointed directly, they go to the designated representative.

01 **Project or operating plan**

Objectives, scope, timeline, reporting line and the arrangements that deliver them.

02 **Responsibilities and approval limits**

Who acts, who approves and what must be referred, including the urgency and authority table.

03 **Provider briefs and confirmed arrangements**

Written briefs, confirmations, and checks before anyone relies on them.

04 **Preparation tracking**

Owners, deadlines, what each step depends on, back-up options and readiness.

05 **Operational reports and recommendations**

Progress, problems and decisions needed, with the approved budget, amounts committed, amounts invoiced and outstanding approvals reported separately for movements, residences, collections, occasions and programmes alike. A commitment is not a payment; payment status comes from the authorised finance team.

06 **Specialist-supported reviews and action trackers**

Such as aviation programme comparisons, refit reviews or security recommendations, with approved actions tracked to completion, where commissioned.

07 **Coordination plans and calendars**

Where commissioned: education-coordination briefs and application timetables, care-coordination plans, maintenance calendars and care instructions, insurance renewal timetables, recruitment briefs and handovers, collection transfer plans, and research briefs for family history.

08 **Programme objectives and follow-up**

Agreed purpose, delivery plan, reflection and next steps.

09 **Operating record and handover**

Procedures, preferences, provider terms and decisions retained by the family.

Terms and relationships

Fees and commercial relationships

NexOra is paid by its clients. Provider commissions and referral payments are neither accepted nor retained. Fees are agreed in writing; any material affiliation or ownership interest relevant to an appointment, including one involving a related business, is disclosed before the client commits. The terms state who contracts with whom and who pays.

Authority, approval limits and information handling are part of every engagement; they are explained on Our Approach.

Referral and delivery relationships

INTRODUCTIONS

Advisors who introduce NexOra

An advisor who introduces NexOra does not become part of the delivery team by doing so. The client keeps its relationship with its advisors and decides what information they receive.

DISCLOSURE

Material commercial interests

NexOra accepts no provider commissions or referral payments. Any material affiliation or ownership interest connected with an introduction or a recommendation is disclosed before the client commits. Agreed confidentiality applies throughout.

DELIVERY

Specialists appointed to deliver

Specialists are appointed through Specialist Selection & Oversight within the client's approval arrangements, and are briefed and reviewed against the work.

Reviewing the relationship

NexOra and the designated client representative review the work, spending, provider performance and upcoming priorities at agreed intervals. Changes to scope, coverage and approval arrangements are recorded in writing.

Where relevant, a review also covers residence readiness, the incident record and the operating plan itself.

Designed for

- Principals whose movements span several countries, aircraft, vessels and residences.
- Family offices that want dedicated leadership, accountable providers and help with decisions alongside their own teams.
- Families with several residences or private assets, through their office or a designated representative.
- Families relocating, changing key members of staff, or planning programmes across generations.
- Advisors whose clients need the work delivered, not only advised on.

Before you appoint NexOra

Who will lead our work?

A named NexOra lead is your principal point of contact, responsible for coordinating the agreed work and keeping you informed. A named backup works from the same plans and records.

Who supports the lead?

The lead coordinates the operating teams and appointed specialists required for your assignment. Their responsibilities, reporting arrangements and coverage are established at the outset.

How is capacity agreed?

The scope, expected workload and coverage are agreed before the engagement begins. Additional projects or material changes in requirements are reviewed separately, so responsibilities and resources remain clear.

How is NexOra paid?

NexOra is paid by its clients and accepts no provider commissions or referral payments. Provider costs are separate from NexOra's fees and approved before commitment. Any material affiliation or ownership interest is disclosed.

Who can access our information?

Access to the operating record is approved by the client's authorised representative. Providers receive the information needed for their assignment. Sharing, storage, access removal and return arrangements are established for the engagement.

What happens if our lead is unavailable or changes?

The backup uses the same operating record. If responsibility passes to a new lead, the handover covers current plans, preferences, provider commitments, outstanding actions and approval arrangements.

How do you work with our existing team?

NexOra works alongside your family office, assistants, managers and advisors. Your team retains its agreed responsibilities; NexOra connects delivery and reports through the route you choose.

What can we expect from the application?

The application and dashboard present current arrangements, reporting and decisions relevant to your role. Your NexOra lead coordinates the work; authority to act comes from the agreed mandate.

Do we need membership to begin?

No. NexOra can be appointed for a defined project, an ongoing family-office mandate or private membership. A Private Operations Review is an optional way to establish priorities.

Online: https://nexoraprivateoffice.com/private-clients/ · https://nexoraprivateoffice.com/family-offices/ · https://nexoraprivateoffice.com/engagement/#membership

PRIVATE CLIENTS

Connected arrangements, wherever the family is.

Specialist expertise for the commitments, interests and transitions that matter to your family.

NexOra brings together the providers and arrangements each assignment needs, with a dedicated lead coordinating delivery and keeping you informed.

More time for your priorities

Your NexOra lead brings specialists, schedules and decisions together, reducing the coordination required from you. Your preferences inform each assignment, while plans and records provide continuity across people and places.

Connected across countries

When family members and commitments span countries, arrangements need to stay connected. NexOra coordinates movements, receiving teams and specialist providers, keeping responsibilities and changes clear across locations.

Knowledge that carries forward

Preferences, provider history and previous decisions inform the next assignment. Plans and outstanding actions remain available when people or arrangements change.

Continuity through a staff transition →

Purposeful family programmes

Heritage, learning, conservation and philanthropic engagement are shaped around what the family wants to achieve, with relevant specialists and agreed follow-up.

A clear client view

The application and dashboard bring current arrangements, outstanding actions and decisions into one view.

Explore further

SERVICES

Mobility and field operations

Air, sea, ground and arrival arrangements as one connected plan, with local checks reporting to your lead.

ENGAGEMENT

Private Membership

A dedicated relationship, client technology and continuing coordination within an agreed scope.

SERVICES

Family programmes

Heritage, learning, conservation and philanthropic programmes, built around what the family wants to achieve.

SELECTED ASSIGNMENTS

Selected NexOra assignments

A family relocation to Hong Kong, replacement hospitality for twenty cricket guests and the Palio in Siena, among other assignments.

Education pathways → **Family history →** **Care arrangements →**

FAMILY OFFICES & ADVISORS

Operational capacity alongside your team.

NexOra coordinates appointed providers, follows delivery and brings clear recommendations to your office. Your team retains direction and approval authority; a named lead connects the work across locations and specialists.

What NexOra adds to a family office

Provider oversight

Finding a specialist is only the beginning. NexOra agrees the brief, follows delivery, reviews performance and brings renewal or replacement decisions to your team, with the options and costs set out for the approver you designate.

International coordination

A single operational lead connects providers and receiving teams across countries, with clear responsibilities, current plans and prepared alternatives. Progress and decisions are reported in the application and dashboard.

Continuity through change

NexOra coordinates handovers around current plans, provider commitments and outstanding decisions. Your team retains the practical knowledge needed to continue the work through changes of staff, locations and providers.

Continuity through a staff transition →

Family engagement

Purpose-led programmes connect younger generations with heritage, learning and philanthropic interests, developed with educators, hosts and qualified advisors.

ILLUSTRATIVE SCENARIOS: **Comparing aviation options →** **Provider oversight →** **A refit decision →** **Moving a collection →** **A staff transition →** **Implementation reporting →**

A scoped mandate, on your terms

Family offices appoint NexOra through a scoped service agreement or mandate. It sets out the work, the reporting line, the approval limits and the decisions you keep.

- ✓ Reporting through your existing structure
- ✓ Authority limited to what you delegate
- ✓ Your confidentiality and purchasing policies followed
- ✓ Records kept in a format you agree, and handed back at the end

NexOra can work with specialist recruiters on assistants, chiefs of staff and other agreed office roles, including role briefs, onboarding and handovers, alongside the client's employment advisors.

How decisions and authority work →

Operational mobilisation as requirements change

Responsibilities, provider commitments, reporting arrangements and handovers organised as the office's requirements change.

- ✓ Establish operational responsibilities
- ✓ Identify current providers and commitments

- ✓ Clarify approval and reporting routes
- ✓ Coordinate access to relevant operating records
- ✓ Organise handovers and immediate priorities

You receive An operating plan, responsibility map and prioritised mobilisation actions.

This is operational coordination alongside the office's appointed advisors. It is not family-office design, compensation advice, investment governance, succession planning, or tax, legal or trust structuring.

Private Operations Review → **How an engagement begins →**

INTRODUCING ADVISORS

From advice to coordinated action.

When a client needs practical arrangements carried through, NexOra can coordinate an agreed assignment alongside their advisors. Professional responsibilities and the client's advisory relationships remain clear.

- ✓ An introduction does not, by itself, make the advisor part of the delivery team.
- ✓ Information is shared only as the client authorises.
- ✓ NexOra's client-funded policy is unchanged for an introduced client.

Investment, legal, tax and other professional advice stays with the client's advisors.

PRIVATE MEMBERSHIP

A dedicated relationship, with your operations in view.

Membership provides a dedicated relationship, client technology and continuing coordination within an agreed scope. Projects, specialist work and extended coverage are agreed separately where required.

What membership includes

The scope and expected volume of work are set out in each written membership agreement.

- An initial consultation and an operating profile for your household
- A named NexOra lead and backup
- Application and dashboard access for the people you authorise
- Coordination of requests within the agreed scope
- A forward look at upcoming commitments
- A planning and service review each quarter
- Your operating records kept up to date
- Regular consolidated reporting
- Provider appointments and performance coordinated within scope

Agreed separately, when needed

Larger pieces of work are scoped and priced on their own, unless your agreement includes them.

- ✓ Major relocations and new-residence set-up
- ✓ Significant works or refit coordination
- ✓ Collection transfers needing a dedicated project

Cover and response

Each agreement names a service window and time zone, with lead and backup handovers. Extended cover is planned for active movements and significant assignments, and out-of-hours escalation routes are confirmed in advance. Urgency never extends spending or appointment authority.

- ✓ Multi-stage family programmes
- ✓ Specialist technical analyses
- ✓ Extended on-site staffing or additional cover
- ✓ Work well beyond the agreed membership workload

Provider costs

Provider costs are separate from NexOra's fees and approved by you before anything is committed. Direct contracts between you and providers are preferred where appropriate. There is no undisclosed markup, provider commission or referral payment.

Client-funded. Clear commercial interests.

NexOra is paid by its clients. Provider commissions and referral payments are neither accepted nor retained, so recommendations are not rewarded by supplier payments. Any material affiliation or ownership interest relevant to an appointment is disclosed before the client commits.