



The Alliance for Societal Impact

Catalyzing Bold Solutions for Generational Impact





The Alliance for Societal Impact

Engaging family offices to shape the future by collaborating to catalyze bold systemic solutions and transformative technologies that drive positive societal impact for generations to come.

Shaping our Future Together

Family offices are quickly realizing that AI is not a tidal shift, it's a tsunami. And the latest iterations – deep learning, natural language processing, computer vision, robotics, and expert systems that mimic human expert decision-making in areas like medical diagnosis and financial advisory tools – make it more than a tech upgrade, it's a survival tool. Family businesses slow to adopt it will watch competitors automate faster, personalize smarter, and scale effortlessly. The risk isn't losing to AI—it's losing to those who wield it.

After hosting three successful family office disruptive technology conferences in collaboration with the Stanford School of Engineering—including a fully streamed event during the pandemic—one truth became evident: multigenerational family offices need more than inspiration from a single event. They need a long-term, values-aligned platform that can turn insights into action and build meaningful connections across generations and sectors.

We also saw the importance of unfettered independence. To serve families with vision and flexibility, this platform must not be limited by any one institution. Instead, it should be free to partner with top faculty from the world's leading engineering and business schools—while remaining grounded in a shared purpose: to harness the best thought leadership in the world to optimize the positive force of advanced technologies for the good of society and the families who steward its future.

The pace of disruption has only intensified since. Global alliances are shifting. University research faces new constraints. Technological change – especially in artificial intelligence – is accelerating faster than ever. Geopolitical tensions, partisan polarization, tariff-induced economic volatility, and the frenetic downsizing of our government and government-backed domestic/foreign aid and cultural institutions have created a level of uncertainty few could have predicted.

This is a defining moment. For families stewarding generational wealth and wisdom, the challenge is no longer just preserving legacy—it's shaping the future. Not only for your family, but for the world your children and grandchildren will inherit.

That's why we formed the Alliance—not to be all things to all people, but to focus on what matters most: empowering extraordinary families to collaborate across generations and with global innovators to develop bold solutions and transformative technologies that build a better future for society.





Our Mandate

- Build a trusted platform for collaboration and guidance—linking family leaders with top thinkers in engineering, science, culture, and enterprise to navigate disruption and act with clarity.
- Co-create multigenerational learning experiences, strategic tools, and investment pathways to prepare families to engage meaningfully with the challenges and opportunities shaping our shared future.
- Capitalize on the “human” aspects of GenAI to help families reimagine legacy-building by digitally capturing in a private, secure Digital Twin, the pioneer’s archive of writings, readings, and recordings, gleaning from these and direct interviews the trials, tribulations, sacrifices, and lessons learned.
- For families with active businesses, utilize this same technology to capture the founders’ intellectual property, proprietary processes, values, and principles (the heart, mind, and soul of the business) to bedrock the culture of the enterprise(s) across all employees,
- Connect rising-generation family leaders with fellow future shapers in science and enterprise through immersive, real-world experiences that foster creative innovation, partnership, and transformational leadership.
- Measure success through real-world outcomes that reflect the Alliance’s collective progress toward long-term societal impact.

The Role of Technology in Creating Societal Impact

The United States has long been the global leader in artificial intelligence (AI) innovation—positioning humanity to solve problems once thought beyond our reach. Much of this progress stemmed from a uniquely American ecosystem: a high-functioning collaboration between private enterprise, academia, government, and nonprofit institutions.

Our competitive edge has been built on decades of technological invention—from computing and information systems to the Internet, mobile technology, and social platforms. Paired with the most developed capital markets in the world, this foundation has allowed U.S. private capital to play a vital role in funding breakthrough research, launching startups, and scaling solutions with global impact.

After years of advancement in Artificial Narrow Intelligence (ANI), we are now entering the age of Generative AI—with early signs of Artificial General Intelligence (AGI) on the horizon. AI now sits at the center of geopolitical competition, economic power, and social change. According to McKinsey (footnote), it may contribute over \$4.4 trillion in annual global economic value.

The Role of Technology in Creating Societal Impact

Countries like China are racing to close the gap by replicating the innovation engines of Stanford, Silicon Valley, and other U.S. tech hubs—investing in lower-cost computing platforms like DeepSeek, which threatens American dominance by potentially eliminating dependence on advanced chips, redefining cost, and bypassing U.S. trade restrictions—challenging both the US' AI business model and its ability to contain China's AI progress. And while the AI revolution is digital in nature, the binding constraint is actually physical infrastructure, meaning whoever scales investment and delivers infrastructure the fastest and most reliably will have the ultimate competitive advantage.

But the real innovation in the age of Gen AI demands more than capital—it demands vision, collaboration, and responsibility.

This alliance and the inaugural conference are designed to do just that: amplify the best of the U.S. innovation ecosystem by convening not only top commercial professors from world-leading research institutions, but also geopolitical strategists, government advisors, startup founders, and venture capital leaders. Our participants—and your peers—are multigenerational family enterprise leaders uniquely equipped to act in this dynamic landscape.

Today, family offices collectively control far more capital than the U.S. venture and private equity sectors combined. That capital has the power not only to accelerate early-stage innovation, but to shape how technology evolves—including its ethical boundaries, societal implications, and long-term impact. The question now is not just how we innovate—but who will shape the values and direction of these technologies as they transform society.

The Role of Family in Creating Societal Impact

Healthy families have long been the backbone of strong societies, shaping values, businesses, and communities that endure. As AI, quantum computing, and other transformative technologies redefine the world, family offices—unlike institutional investors focused on short-term gains—offer a multigenerational perspective rooted in stewardship and purpose. When guided by fundamental human values and well-informed wisdom, these technologies can be harnessed to build, heal, and enhance society for generations to come.

How We Will Act Upon This Vision

The Alliance will act on its vision through seven long-term strategic priorities. It will be led by a professional management team composed of experts in technology, family office leadership, and faculty from top global engineering and business schools

Our Core Strategies

1. Technology as A Positive Solution to Critical Human Problems:

- ✦ Identify and foster advanced technologies to solve global challenges
- ✦ Provide actionable research and insights to guide business leadership and/or investment opportunities and decisions.

2. Empowering the Next Generation:

- ✦ Educate future leaders through primers, workshops, internships with PhD students (digital training manuals) and interactive workshops to demystify disruptive technology
- ✦ Utilize GenAI to create Digital Twins to capture the heart, intellect, and soul of the wealth-creator(s) and human-oriented, function-specific AI Agents to help master any aspect of the family business(es), including instant utilization of the entire tech stack, without prior training.

3. Connection and Collaboration:

- ✦ Facilitate meaningful networking through curated events and shared learning.
- ✦ Offer instant access to the Alliance's trusted cross-generational, cross-sectoral community.

4. Showcase Investment Opportunities with Societal Impact:

- ✦ Showcase vetted startups that blend financial returns with societal benefits.
- ✦ Leverage success stories from family offices excelling in tech investments.
- ✦ Establish a multigenerational advisory board to guide investment strategies.

5. Build a Collaborative Ecosystem:

- ✦ Establish a digital platform for continuous knowledge exchange.
- ✦ Strengthen partnerships among family offices, AI innovators, academic institutions, and investors.
- ✦ Encourage and monitor those partnerships to co-create impactful initiatives.
- ✦ Foster peer-to-peer learning to optimize wealth and wisdom transfer

Our Core Strategies

6. Sustaining Momentum Post-Conference:

- ✦ Drive ongoing engagement through follow-up events, webinars, and an online community.
- ✦ Provide actionable frameworks and tools to enable family offices to integrate advanced technologies like AI into their investment strategies

7. Measure and Share Success Stories:

- ✦ Educate future leaders through primers, workshops, internships with PhD students (digital training manuals) and interactive workshops to demystify disruptive technology
- ✦ Utilize data mining and feedback to continuously refine and enhance Alliance activities

The Alliance Partner Team

We have assembled a partner team of family office leaders, disruptive tech experts and experienced conference organizers, almost all of whom were directly involved in the prior Stanford-hosted programs.



Michael Steep
*Founder Stanford
Disruptive Tech Program*



Lonnie Gienger
Family Office & Investor



Jeremiah Baker
*Co-Founder of Bonin
Ventures*



Bob Bernstein
*Co-founder, Prism Family
Office*



Cheryl Goodman
*CEO Find Good Tech AI
Event Management*



Lisa Christian, CISSP
Innovation Consultant