

Family Office Cup Revived to Inspire Younger Generations

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On Jun. 18, NYCPA's Family Office Community of Practice revived the Family Office Cup at the offices of entertainment law firm Pryor Cashman LLP. The event, held a few times in the past, returned with renewed energy after several years.

"The idea is to promote younger staff," said event organizer [Gilad Rand](#), current chair of NYCPA's Family Office Community and a director at Anchin. "It is meant for all levels below manager, including seniors or supervisors. Some firms do not have a supervisor level, so we mandated that it would be for first-year managers, not anyone above that level. We want to help younger staff brush up on their communication skills before they become client-facing. At least three firms are required to participate, and we find a common theme that they can compete on."

Rand explained that, under the Family Office Cup competition rules, teams compete by presenting innovative ideas relevant to family offices, highlighting themes such as family legacy and wealth transfer. The topic this year was "Practical Applications of AI for Family Offices."

Sponsored by Henley & Partners, the event was an opportunity for firms to develop their younger staff. Participants in the June competition were young accounting

professionals from three accounting firms— Anchin, EisnerAmper, and BDO USA—with offices in the New York City area.

“I didn’t think I was going to be able to organize the event because I reached out to a lot of firms, but everybody gave me the cold shoulder. At one point, I said, ‘Shame, but I’m not going to be able to do it.’”

Luckily, Rand was able to galvanize a team from his firm, Anchin; found a community member from Eisner who agreed to participate; and recruited a good friend from BDO.

The program was designed to help young professionals sharpen their presentation abilities through feedback from seasoned professionals. The team-based format included three professionals from each organization. Each team had 12 to 14 minutes, allowing each team member to present for roughly four minutes, leaving time for follow-up questions from the judges and audience. Scoring was based on agreed-upon criteria such as accuracy, creativity, presentation, and efficiency. After their presentations, each team received feedback from the judges.

This year’s judging panel included three previous chairs of the community, along with host William (Bill) Charron of Pryor Cashman. Joseph Ali of PKF O’Connor Davies, a former cup winner; Richard Dauman of Andersen; and Susan Schoenfeld of Wealth Legacy Advisors judged the competition.

The winning team received the Family Office Cup, and an additional award was given to the most valuable player (MVP). All cash prizes were donated to a local charity. **[Anchin’s Private Client Group](#) won the cup, with team members Su Yi Chen, Luke Dougan (an MVP), and Tiffany Gonzalez.**

Prior to the event, Rand organized a pre-Family Office Cup meetup on May 29 at Pryor Cashman LLP. There, participants met with Rand, Charron, Ali, and Andrew Romano of Strategies for Wealth, who assisted with organizing the event.

At the pre-event, Rand invited public speaking professionals to help coach participants on how to present to a live audience. They were told to expect the unexpected and advised to avoid covering their faces and not to use notes. The

audience wants to see them and hear them clearly. Good content and a nice presentation make all the difference.

Rand said he was also there to advise his team at Anchin, encouraging them to rehearse as much as they could and not be intimidated by the audience. A solid and well-rounded presentation was key.

“In this case, they had to have a good explanation of what AI is in terms of content. They had to be eloquent and speak to the audience and judges during their presentation. I also told them to try to be comfortable with their words and not to read everything from their notes.”

After the event, Rand emailed the participants with one thought in mind: They are all winners.

“It’s not easy for a young professional, or even a senior supervisor or a first-year manager. They are all under 30, still relatively young, and there’s the element of nervousness. Not everybody can step in front of a 50-person audience.”

Rand said he would absolutely organize the event again in the future.

“We need younger people in these communities. The fact that the event is geared toward young professionals, I would hope that, whether it be people in the audience, associates, or the participants themselves, I would want to engage them more in the community, because the idea was for them to grow. If I can provide them with a platform where they can present, mentor, and have fun, then they would come again, because all I did was to provide content and educate them about family office.”

The cup was awarded during a networking event that followed the presentations.