



Household, Estate & Portfolio Operations

Organizational Assessment, Design & Strategic Search

Aligning People, Processes, and Properties to Support Exceptional Private Living

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Designing the Organization that Supports the Life You Want to Live

Families of significant wealth often manage complex residential organizations, multiple homes, extensive service teams, and evolving expectations around lifestyle, privacy, and security. Yet most are not intentionally structured as cohesive organizations, with clear roles, accountability, and aligned human resource strategy.

Roles evolve organically. Reporting lines blur. Expectations remain undocumented.

As portfolios expand and teams grow, complexity often outpaces structure. Even highly capable teams can experience:

- Unclear roles & accountability
- Operational inefficiencies & duplication of effort
- Inconsistent service delivery
- Misaligned compensation structure & performance expectations
- Staff turnover & retention challenges
- Leadership fatigue

Since 2010, Tapestry has advised Principals and family offices operating some of the most complex private residential environments. We serve as an independent advisor solely representing the client.

Tapestry helps Principals and family offices step back and evaluate the full ecosystem of people, processes, and properties, bringing structure to what has evolved, and clarity to what has become complex.

Through structured assessment and advisory, we design the organizational model required to support how the Principal lives, defining roles, structuring, teams and establishing performance over time.

Engagements typically occur at key inflection points, when existing structures, leadership, or staffing models no longer support how they want to live.

When Structure, Clarity & Leadership Become Critical

Common inflection points include:

- **The First Layer of Support** - As households grow beyond informal support, defining scope, first hires, and compensation philosophy
- **Portfolio Expansion** - Growth requires coordinated structure, leadership, and consistency across residences
- **Leadership Transitions** - A natural moment to reassess structure, reporting, and expectations before new leadership is introduced
- **Organizational Strain** - Turnover, inconsistency, or unclear reporting often signal deeper structural misalignment
- **Major Lifestyle or Property Changes** - New builds, capital projects, acquisitions or life changes expose gaps in staffing & leadership coverage
- **Planning for Continuity** - Structuring for long-term sustainability, succession, and general transition



Understand Before You Design (or Hire)

Engagements begin with a structured assessment of how the organization operates today, establishing a clear, objective view of how support is delivered across people, processes, properties, and specialized services.

We assess: how responsibilities are distributed, how work flows across residences, where coordination or accountability breaks down, how systems and vendors are integrated, and where risk or inefficiency may exist.

All recommendations are grounded in alignment around the **Principal's Value Triangle**:

Appetite for Staff | Desired Experience | Cost To Support & Sustain

The right structure is not standardized. It reflects how the Principal lives, their priorities for support, and the cost required to deliver it. The outcome is a clear view of the current organization, paired with decision-ready practical recommendations and a tailored, prioritized future roadmap.

01

COMPREHENSIVE ASSESSMENT

Including direct client engagement, property visits and stakeholder interviews to assess portfolio, property, and household operations across:

- Facilities & maintenance
- Service delivery
- HR & staffing structure
- Collections
- Event management
- Capital projects
- Budget & cost controls
- Technology & cyber
- Site & personal security
- Maritime & aviation assets

02

RECOMMENDATIONS

Creation of an operational roadmap to improve service delivery, efficiency, and ROI including:

- Role creation and realignment of responsibilities
- Best practices to improve efficiency and preserve asset value
- Surge support and project management to augment existing teams
- Targeted referrals to subject matter experts

03

IMPLEMENTATION

Assist with full or partial implementation of any desired initiatives, including:

- Staff placement
- Team development
- Vendor sourcing & vetting
- Organizational change management
- Best practice implementation
- SOP development
- Inventory and asset management
- Capital project owner's representation
- Ongoing advisory

STRATEGIC SEARCH & PLACEMENT



Ensuring the Right People for the Organization

Once the organizational structure is defined, Tapestry supports the recruitment and placement of key roles across the household, estate, or residential portfolio organization.

Tapestry is not a recruiter. We act as independent, Principal-aligned counsel, managing and coordinating multiple recruiting partners to preserve privacy and produce the strongest candidate field.

Recruiters represent the Candidates, Tapestry represents the Principal.

Candidates are evaluated through the lens of Tapestry's assessment, grounded in a clear understanding of the Principal, their family, the culture of the organization, and how each role must function within it—and informed by seasoned estate and family office professionals with direct experience operating in and overseeing these roles.

01

ROLE DEFINITION & COMPENSATION STRATEGY

- Develop roles, reporting lines, and success metrics
- Clarify scope, priorities, & performance expectations
- Compensation benchmarking using market data and proprietary insights
- Advise on HR infrastructure, employment platforms, and payroll & benefits providers

02

SEARCH STRATEGY & CANDIDATE SOURCING

- Define search strategy & engage recruiting partners
- Leverage Tapestry's network across private service & family office communities
- Manage recruiter engagement, candidate flow & overall timelines

03

CANDIDATE VETTING & OFFER NEGOTIATION

- Structured screening and candidate calibration
- Decision-ready candidate briefing materials
- Comprehensive background investigations and third-party diligence
- Coordination of skills testing and reference verification
- Offer structuring, drafting and negotiation

Representative Roles Supported

Director of Residences & Lifestyle | Estate Manager | Executive Personal Assistant | Chief of Staff | Director of Real Estate | Owner's Representative
Director of Facilities | Facilities Manager | Technology Director | Household Manager | Private Chef | Nanny / Childcare Professionals | Caregivers & Private Nurses | Housekeepers & Personal Service Staff

TAPESTRY LEADERSHIP



Anne Lyons - Founder & Strategic Advisor

Anne brings over three decades of experience managing the design, development, and delivery of complex lifestyle properties and assets. Trained as an interior designer, she brings a deep understanding of the design process and the practical realities of translating vision into built form. Prior to founding Tapestry in 2010, she represented a global residential portfolio for Paul G. Allen at Vulcan Inc., overseeing development, design, construction, and operational turnover across a geographically diverse asset base, including marine and aviation assets. Anne brings a rare combination of design fluency, financial discipline & operational insight to the private residential context.



Judy Boerner-Rule - Principal & Chief Executive Officer

Judy leads Tapestry's advisory practice and serves as the firm's owner and Chief Executive Officer, focused on organizational design, operational alignment, and strategic search and placement engagements. She brings a distinct combination of organizational insight, service model fluency, and firsthand operational experience. Her background includes senior leadership roles in luxury hospitality and more than two decades advising UHNW families and family offices. Prior to joining Tapestry, she served as Senior Director of Operations for the Bill & Melinda Gates family, overseeing staffing architecture, hospitality delivery, human resources, finance, facilities, technology infrastructure, and capital projects across a complex, multi-residence portfolio. Judy is known for helping clients align people, processes, and properties in ways that are both highly personalized and operationally sustainable.



Lara Davis - Managing Director of Placement & Family Services

Lara brings a deeply relational and operationally grounded perspective to Tapestry's advisory and search practice, shaped by a career spanning hands-on service, talent recruitment, and leadership in complex private households. She partners closely with Principals and family offices to guide search and placement engagements, ensuring clarity, alignment, and a seamless process. Her work is grounded in a nuanced understanding of how successful placements are not only identified but also integrated and sustained over time. Lara is particularly skilled in evaluating candidates through the lens of family culture, expectations, and interpersonal dynamics — supporting long-term fit, performance, and retention.



Kevin Johnson - Managing Director of Enhancement

A former yacht captain, Director of Residences, and Owner's Representative, Kevin brings more than fifteen years of experience across superyacht, residential, and private estate environments. He has led high-value capital projects and advised UHNW clients and family offices on design, construction, technology integration, and security planning. Just as importantly, he brings strong organizational and operational expertise, aligning people, processes, and systems to support both day-to-day performance and long-term effectiveness.



Kevin O'Connor - Owner's Representative

Kevin brings over twenty years of experience across complex private estates, residential portfolios, and superyacht programs. As Director of Residences for a global Principal, he oversaw an extensive portfolio including a 60,000 sq. ft. Palm Beach estate, multiple residences, a world-class art collection, aviation and marine assets, and a Grand Prix equestrian program, including an \$80M renovation of an Upper East Side townhouse. Kevin holds an MCA Master 3,000 GT license, has commanded yachts up to 90 meters, and founded Berth One Palm Beach, later acquired by Safe Harbor Marinas (Blackstone).