HMN-ACADEMY

PROFESSIONAL EDUCATION FOR PRIVATE SERVICE

CHIEF OF STAFF

EXECUTIVE CERTIFICATION

PRIVATE SERVICE LEADERSHIP &
EXECUTIVE OPERATIONS

ADVANCED EXECUTIVE PROGRAM



HMN ACADEMY

PROFESSIONAL EDUCATION
FOR THE PRIVATE DOMESTIC SECTOR

CHIEF OF STAFF EXECUTIVE CERTIFICATION PROGRAM

PROGRAM OVERVIEW

The Chief of Staff Executive Certification is an advanced professional training program designed to prepare experienced private-service professionals for executive-level leadership, strategic coordination, and operational oversight within complex private households, family offices, and principal-led environments.

The curriculum develops the capabilities required to operate across personal, household, family office, and business domains. Students explore executive communication, strategic planning, financial oversight, cross-functional operations, leadership and delegation, project management, external relationship management, technology and executive infrastructure, decision-making, crisis leadership, family office integration, and advanced Chief of Staff strategy.

Through this program, students develop the strategic judgment, leadership capability, organizational discipline, discretion, and executive perspective required to coordinate complex priorities, establish accountability across teams, support high-level decision-making, and serve as a trusted strategic partner to the principal.

WHO THIS PROGRAM IS FOR

- Experienced private-service professionals preparing to advance into Chief of Staff positions
- Current Chiefs of Staff seeking to strengthen their executive leadership and operational capabilities
- Estate Managers, Directors of Residences, and other senior managers preparing for broader executive responsibilities
- Executive and Personal Assistants with substantial experience seeking advancement into strategic leadership roles
- Professionals working across private households, family offices, lifestyle operations, or principal-led organizations
- Senior professionals responsible for coordinating multiple teams, managers, advisors, properties, projects, or operational domains
- Professionals seeking to develop the executive-level judgment, leadership, and strategic capabilities required for advanced private-service positions

ADMISSION REQUIREMENTS

The Chief of Staff Executive Certification is an advanced professional program intended for experienced professionals preparing for or currently operating within senior leadership and executive-support positions.

- **Bachelor's Degree and Professional Experience:** Applicants should hold a bachelor's degree from an accredited higher-education institution and have a minimum of 7 years of relevant professional experience, including demonstrated experience in management, executive support, private service, family office operations, business operations, hospitality leadership, or another closely related field.
- **Senior Leadership Experience:** Applicants who do not hold a bachelor's degree should demonstrate a minimum of 10 years of progressive professional experience, including significant leadership, management, executive support, or senior operational responsibility.
- **Advanced Education:** Advanced degrees and relevant postgraduate education are highly regarded, particularly in areas such as business administration, management, finance, organizational leadership, hospitality, law, or other disciplines relevant to executive operations and leadership.

Previous employment specifically under the title of Chief of Staff is not required. Qualified applicants may come from senior private-service, family office, executive support, management, hospitality, or related leadership backgrounds.

Meeting the minimum admission requirements does not guarantee acceptance into the Chief of Staff Executive Certification program. All applications are reviewed individually, and admission is granted at the discretion of HMN-Academy based on the applicant's professional experience, qualifications, demonstrated level of responsibility, and overall alignment with the program.

CHIEF OF STAFF EXECUTIVE CERTIFICATION PROGRAM

PROGRAM FORMAT

- Delivery: Self-Paced Online Executive Certification
- Completion Timeline:
  - As little as 12-16 weeks with full-time dedication
  - Approximately 6-9 months on a part-time basis

- PROGRAM COMPONENTS INCLUDE:
  - Comprehensive, structured executive-level reading materials
  - Professionally developed video presentations aligned with course content
  - Case studies based on real-world private-service, family office, and executive scenarios
  - Applied assignments and practical executive exercises
  - Knowledge checks throughout each chapter
  - Professional checklists and operational resources
  - Graded case studies and applied assignments
  - Comprehensive 200-question final examination
  - 30/60/90-Day Strategic Execution & Principal Support Plan
  - Video presentation of the 30/60/90-Day Plan

EMPLOYMENT DISCLAIMER

Successful completion of the program and/or earning the Chief of Staff Executive Certification does not guarantee employment, job placement, promotion, or a specific level of compensation within the private-service or family office sectors. Employment outcomes depend on multiple factors, including a candidate's prior experience, education, professional qualifications, demonstrated knowledge and competencies, leadership experience, references, interview performance, geographic market, and individual employer requirements. Completion of the program is designed to strengthen executive-level knowledge, professional preparedness, and competitive positioning within the private-service sector but should not be interpreted as a guarantee of employment or advancement.

CHIEF OF STAFF CERTIFICATION PROGRAM SYLLABUS

COURSE CURRICULUM:

Chapters & Key Modules

CHAPTER 1. THE CHIEF OF STAFF ROLE IN PRIVATE SERVICE

This chapter provides a comprehensive overview of the Chief of Staff role within private households, estates, and family offices. It explores key responsibilities, required competencies, and how the role interfaces with principals, families, and staff to ensure effective leadership, discretion, and operational excellence.

- Module 1: The Evolution of the Chief of Staff Role
- Module 2: Core Responsibilities and Key Functions
- Module 3: Required Competencies and Personal Attributes
- Module 4: Distinction Between Chief of Staff and Other Private Service Roles
- Module 5: Working with Principals, Families, and Advisors
- Module 6: Setting Expectations and Defining Success

CHAPTER 2. EXECUTIVE COMMUNICATION & PRINCIPAL ALIGNMENT

This chapter focuses on advanced communication strategies essential for a Chief of Staff, including managing information flow, maintaining confidentiality, and ensuring clear, consistent alignment with the principal's goals, values, and expectations.

- Module 1: Principles of Executive Communication
- Module 2: Communicating with Principals
- Module 3: Managing Confidential Information
- Module 4: Written Communication for Executive Environments
- Module 5: Verbal Communication and Briefings
- Module 6: Managing Sensitive Conversations
- Module 7: Ensuring Alignment and Follow-Through

CHAPTER 3. STRATEGIC PLANNING & PRINCIPAL PRIORITIES

This chapter explores how to develop and implement strategic plans that support the principal's personal, professional, and philanthropic goals. It covers prioritization, long-term planning, and the integration of household, business, and lifestyle objectives.

- Module 1: Understanding the Principal's Vision and Priorities
- Module 2: Strategic Planning Frameworks
- Module 3: Goal Setting and Prioritization
- Module 4: Annual and Quarterly Planning Processes
- Module 5: Integrating Household, Business, and Personal Objectives
- Module 6: Tracking Progress and Adjusting Plans
- Module 7: Communicating Plans and Gaining Buy-In

CHIEF OF STAFF CERTIFICATION PROGRAM SYLLABUS

COURSE CURRICULUM:

Chapters & Key Modules

CHAPTER 4. CROSS-FUNCTIONAL OPERATIONS & EXECUTIVE OVERSIGHT

This chapter focuses on the Chief of Staff's responsibility for coordinating multiple operational domains, establishing accountability, and maintaining visibility across complex household, estate, and family-office functions.

- Module 1: Understanding Household, Estate, and Family Office Operations
- Module 2: Integrating Multiple Functions and Departments
- Module 3: Establishing Systems, Processes, and Standards
- Module 4: Monitoring Operations and Ensuring Accountability
- Module 5: Identifying Risks and Operational Gaps
- Module 6: Vendor, Contractor, and External Partner Coordination
- Module 7: Maintaining Oversight and Reporting to the Principal

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CHAPTER 5. FINANCIAL OVERSIGHT & EXECUTIVE-LEVEL FINANCIAL WORKFLOWS

This chapter develops the financial oversight capabilities required to support budgets, reporting, approvals, major expenditures, financial controls, and coordination with accountants, advisors, and other financial professionals.

- Module 1: Executive Overview of Household and Estate Finances
- Module 2: Budgeting, Forecasting, and Financial Planning
- Module 3: Financial Reporting and Analysis
- Module 4: Approvals, Authorization Levels, and Internal Controls
- Module 5: Cash Flow Management and Funding Requests
- Module 6: Major Purchases, Projects, and Capital Expenditures
- Module 7: Working with Financial Professionals
- Module 8: Financial Documentation and Record Keeping

CHAPTER 6. LEADERSHIP, DELEGATION & SENIOR TEAM MANAGEMENT

This chapter develops the leadership capabilities required to direct senior staff, establish accountability, delegate effectively, manage performance, and create alignment across multidisciplinary teams.

- Module 1: Leadership in a Private Service Environment
- Module 2: Building and Managing High-Performing Teams
- Module 3: Delegation and Empowerment
- Module 4: Performance Management and Accountability
- Module 5: Communication and Team Alignment
- Module 6: Conflict Resolution and Difficult Situations
- Module 7: Staff Development, Retention, and Succession Planning

COURSE CURRICULUM:

Chapters & Key Modules

CHAPTER 7. PRINCIPAL SUPPORT, CALENDAR MANAGEMENT & TRAVEL COORDINATION

This chapter provides a comprehensive approach to managing the principal's time, travel, and personal logistics in a highly organized, proactive, and discreet manner.

- Module 1: Advanced Calendar Management
- Module 2: Prioritization and Time Optimization
- Module 3: Domestic Travel Planning and Coordination
- Module 4: International Travel Planning and Coordination
- Module 5: Itinerary Development and Travel Documentation
- Module 6: Travel Logistics, Transportation, and Accommodations
- Module 7: Managing Changes, Disruptions, and Emergencies

CHAPTER 8. DISCRETION, CONFIDENTIALITY & RISK MANAGEMENT

This chapter covers the principles and practices required to protect the principal, family, and household through strong discretion, confidentiality, and comprehensive risk management.

- Module 1: Understanding Discretion and Confidentiality
- Module 2: Managing Sensitive Information
- Module 3: Identifying and Mitigating Risks
- Module 4: Security Awareness and Personal Safety
- Module 5: Crisis Management and Emergency Response
- Module 6: Reputation Management
- Module 7: Creating a Culture of Discretion and Accountability

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CHAPTER 9. VENDOR, PROPERTY & ASSET COORDINATION

This chapter provides the framework for managing vendors, properties, and assets to ensure high standards, operational efficiency, and long-term value.

- Module 1: Building and Managing Vendor Relationships
- Module 2: Procurement Processes and Best Practices
- Module 3: Property Operations and Maintenance Oversight
- Module 4: Asset Management and Inventory Control
- Module 5: Service Agreements, Contracts, and Renewals
- Module 6: Quality Control and Performance Evaluation
- Module 7: Cost Management and Value Optimization

COURSE CURRICULUM:

Chapters & Key Modules

CHAPTER 10. HIGH-PROFILE EVENTS, HOSPITALITY & SPECIAL PROJECTS

This chapter covers the planning, coordination, and execution of high-profile events, hospitality, and complex special projects. It focuses on discretion, precision, and seamless execution in both private and public settings.

- Module 1: Event Planning Frameworks and Protocols
- Module 2: High-Profile Guests and VIP Management
- Module 3: Venue Selection, Vendor Coordination, and Logistics
- Module 4: Household and Corporate Event Management
- Module 5: International Events and Travel-Related Functions
- Module 6: Special Projects and One-Time Initiatives
- Module 7: Post-Event Review and Continuous Improvement

CHAPTER 11. TECHNOLOGY, INFORMATION SYSTEMS & DIGITAL MANAGEMENT

This chapter provides the knowledge and skills to implement and manage technology systems that support a secure, efficient, and seamless household and estate operation. It explores best practices for digital organization, cybersecurity, and the use of technology to enhance communication, productivity, and oversight.

- Module 1: Technology Strategy for the Private Household
- Module 2: Hardware, Software, and System Management
- Module 3: Digital Organization and File Management
- Module 4: Cybersecurity and Data Protection
- Module 5: Communication Platforms and Collaboration Tools
- Module 6: Automation and Workflow Optimization
- Module 7: Troubleshooting, Vendor Support, and System Updates

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CHAPTER 12. LEGAL, COMPLIANCE & GOVERNANCE

This chapter provides a comprehensive understanding of the legal, compliance, and governance considerations relevant to a Chief of Staff. It covers key regulations, documentation requirements, and best practices to ensure the household operates within legal and ethical boundaries while maintaining discretion and risk awareness.

- Module 1: Overview of Legal and Regulatory Considerations
- Module 2: Employment Law Fundamentals
- Module 3: Contracts, Agreements, and Documentation
- Module 4: Privacy, Confidentiality, and Data Protection
- Module 5: Insurance and Liability Considerations
- Module 6: Governance Structures and Decision-Making Protocols
- Module 7: Working with Legal, Financial, and Other Professional Advisors

CHIEF OF STAFF CERTIFICATION PROGRAM SYLLABUS

COURSE CURRICULUM:

Chapters & Key Modules

CHAPTER 13. FAMILY OFFICE & EXECUTIVE STAKEHOLDER INTEGRATION

Develops the ability to coordinate effectively across family office leadership, professional advisors, household operations, business stakeholders, and multiple family members while maintaining clear governance and professional boundaries.

- Module 1. Understanding Family Office Structures and Functions
- Module 2. Working with Family Office Leadership and Professional Advisors
- Module 3. Coordinating Household, Family Office, and Business Stakeholders
- Module 4. Coordinating Family Office Meetings, Briefings, and Executive Follow-Through
- Module 5. Managing Stakeholder Commitments, Deadlines and Accountability
- Module 6. Navigating Multiple Family Members and Stakeholder Priorities
- Module 7. Maintaining Boundaries Between Personal and Professional Matters
- Module 8. Creating Alignment Across the Principal's Support Infrastructure
- Module 9. Understanding Family Governance, Decision Structures, and Professional Boundaries

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CHAPTER 14. ADVANCED CHIEF OF STAFF STRATEGY

Develops advanced Chief of Staff capabilities in executive foresight, strategic partnership, complexity management, principal leverage, constructive challenge, and leadership at scale.

- Module 1. Anticipation and Executive Foresight
- Module 2. Managing Complexity at Scale
- Module 3. Acting as a Strategic Partner to the Principal
- Module 4. Balancing Advisor, Operator, Leader, and Executor Responsibilities
- Module 5. Creating Leverage for the Principal
- Module 6. Protecting the Principal's Time and Attention
- Module 7. Providing Constructive Challenge and Influencing Executive Decisions
- Module 8. Operating at an Executive Leadership Level

CHAPTER 15. CHIEF OF STAFF APPLIED ASSESSMENT

Requires students to demonstrate integrated understanding and executive application of the program through a comprehenstive final examination and a strategic 30/60/90-Day Principal Support Plan with video presentation.

- Final Examination – Comprehensive Exam, 200 Questions
- 30-60-90 Plan
- Video Presentation of Chief of Staff 90-Day Strategic Execution & Principal Support Plan

CERTIFICATION REQUIREMENTS & COMPLETION STANDARDS

CERTIFICATION REQUIREMENTS

To earn the Chief of Staff Executive Certification, students must successfully complete all required components of the program, including:

- All 15 program chapters
- Required reading and video instruction
- Case studies and applied assignments
- Knowledge checks
- Professional checklists and operational exercises
- Graded case studies and assignments
- Comprehensive 200-question final examination
- 30/60/90-Day Strategic Execution & Principal Support Plan
- Video presentation of the 30/60/90-Day Plan

GRADING & ASSESSMENT

Student performance is evaluated through graded assignments, case studies, knowledge checks, the comprehensive final examination, and the final applied assessment.

A minimum score of 80% is required to successfully meet the program's grading standard and qualify for certification.

FINAL EXAMINATION

Students must complete a comprehensive 200-question final examination assessing their understanding and application of the executive leadership, strategic, operational, financial, communication, and decision-making principles addressed throughout the program.

FINAL APPLIED ASSESSMENT

Students must develop a 30/60/90-Day Strategic Execution & Principal Support Plan demonstrating how they would assess priorities, establish executive operating structures, strengthen communication and accountability, coordinate stakeholders, identify operational gaps, and develop an actionable strategy aligned with the principal's priorities.

Students must also complete a professional video presentation of their plan, demonstrating executive communication, strategic reasoning, organization, and the ability to clearly articulate priorities and recommendations.

COMPLETION STANDARDS

Certification is awarded upon successful completion of all required coursework and assessments, including the final examination, 30/60/90-Day Strategic Execution & Principal Support Plan, and video presentation, with the required minimum passing score of 80%.

CHIEF OF STAFF CERTIFICATION PROGRAM

HMN Academy

A Chief of Staff operates at the intersection of strategy, people, and execution—turning vision into action, creating alignment, and enabling the principal's success.

This certification is designed for individuals who are committed to developing the expertise, judgment, and leadership capabilities to serve as trusted advisors and strategic partners to the principal.

Whether you are refining your current role or preparing for the next level, the investment in your knowledge and skillset will define your long-term success.

The time to elevate your career is now.

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