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5W RESEARCH · 2026 SERIES

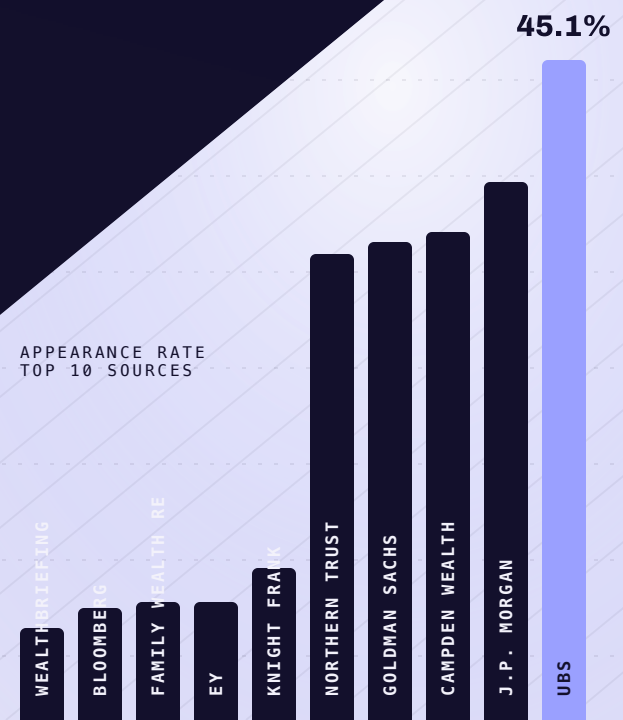
FAMILY OFFICES RETRIEVAL INDEX

Which sources AI engines name
288 AI answers · October 26, 2026

Measured :
October 26, 2026
24 questions × 3 runs · 288 AI answers

Engines :
ChatGPT · Claude · Gemini · Perplexity
plus 58 Google AI Overviews

Prepared by :
5W
5wpr.com



AT A GLANCE

UBS and J.P. Morgan lead. The two are within the margin of error.

UBS appeared in 130 of 288 four-engine answers (45.1%), and J.P. Morgan in 106 of 288 (36.8%). The two intervals overlap. Campden Wealth, Goldman Sachs and Northern Trust each appeared in roughly a third of answers. Google showed AI Overviews for 58 of 72 lookups (80.6%). Of 2,932 four-engine citations, company and brand sites supplied 1,757 (59.9%), trade and specialist press 248 (8.5%) and directories and rankings 215 (7.3%).

> Version 2. This version replaces the first version of this study, first published July 20, 2026. It uses measured counts, so the two versions are not comparable.

288
AI answers analyzed across ChatGPT, Claude, Gemini and Perplexity

45.1%
of answers named UBS, the most-named (130 of 288)

11
tracked names named at least once (of 11)

80.6%
of Google searches showed an AI Overview (58 of 72)

INSIDE THIS REPORT

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KEY FINDINGS

01 What the data shows

TOP NAME

45.1%

UBS appeared in 130 of 288 four-engine answers (45.1%, CI 39.5–50.9%), the highest rate of any tracked name.

STATISTICAL TIE

36.8%

J.P. Morgan appeared in 106 of 288 answers (36.8%, CI 31.4–42.5%). Its interval overlaps with UBS, so the two cannot be ranked against each other.

NAMED FIRST

55 vs 53

UBS was the first tracked name in 55 of 288 answers and Campden Wealth in 53 of 288. Both had an average first position of 1.9.

AI OVERVIEWS

80.6%

Google showed an AI Overview for 58 of 72 lookups (80.6%, CI 70–88%). J.P. Morgan was the most-named tracked entity in those overviews, at 15 of 58 (25.9%).

BRAND SITES

76.9%

Company and brand sites accounted for 2,255 of 2,932 four-engine citations (76.9%). Trade and specialist press accounted for 122 (4.2%).

WIKIPEDIA

93

en.wikipedia.org was the most-cited domain, with 93 occurrences (3.2% of citations) across 56 of 288 answers (19.4%).

ENGINE SPREAD

58.3% vs 18.1%

ChatGPT named Goldman Sachs in 42 of 72 answers (58.3%). Claude named it in 13 of 72 (18.1%).

TRADE PRESS

8%

Family Wealth Report appeared in 23 of 288 answers (8%) and WealthBriefing in 18 of 288 (6.3%). The Financial Times appeared in 10 of 288 (3.5%) and received 0 of 2,932 citations.

SOURCE MIX

59.9%

Of 2,932 four-engine citations, company and brand sites supplied 1,757 (59.9%), trade and specialist press 248 (8.5%) and directories and rankings 215 (7.3%).

THE LEADERBOARD

02 Which names AI engines name

Appearance rate across 288 four-engine answers. The bar is the 95% confidence interval; overlapping bars cannot be told apart at this sample size.

	BRAND	RATE	NAMED IN
1	UBS	45.1%	130/288
2	J.P. Morgan	36.8%	106/288
3	Campden Wealth	33.3%	96/288
4	Goldman Sachs	32.6%	94/288
5	Northern Trust	31.9%	92/288
6	Knight Frank	10.4%	30/288
7	Family Wealth Report	8.0%	23/288
8	EY	8.0%	23/288
9	Bloomberg	7.6%	22/288
10	WealthBriefing	6.3%	18/288
11	Financial Times	3.5%	10/288

02

THE LEADERBOARD

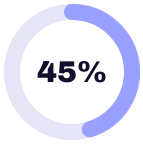
The full list

Own-domain citation is the share of 288 grounded answers that cited the entity's own domains (subdomains included). Citation share is of all 2,932 citations.

#	NAME	NAMED IN	APPEARANCE RATE	95% INTERVAL	FIRST MENTION	OWN-DOMAIN CITATION	CITATION SHARE
1	**UBS**	130/288	**45.1%**	39.5–50.9%	1.9	19.4% (56/288)	2.3%
2	**J.P. Morgan**	106/288	**36.8%**	31.4–42.5%	2.1	14.6% (42/288)	1.6%
3	**Campden Wealth**	96/288	**33.3%**	28.1–39%	1.9	13.5% (39/288)	1.5%
4	**Goldman Sachs**	94/288	**32.6%**	27.5–38.3%	2.8	15.3% (44/288)	1.7%
5	**Northern Trust**	92/288	**31.9%**	26.8–37.5%	2.7	14.9% (43/288)	1.6%
6	**Knight Frank**	30/288	**10.4%**	7.4–14.5%	3.2	1.7% (5/288)	0.2%
7	**Family Wealth Report**	23/288	**8%**	5.4–11.7%	2.1	5.9% (17/288)	0.6%
8	**EY**	23/288	**8%**	5.4–11.7%	3.6	5.2% (15/288)	0.5%
9	**Bloomberg**	22/288	**7.6%**	5.1–11.3%	3.3	1% (3/288)	0.1%
10	**WealthBriefing**	18/288	**6.3%**	4–9.7%	3.1	2.4% (7/288)	0.3%
11	**Financial Times**	10/288	**3.5%**	1.9–6.3%	4.1	0% (0/288)	0%

PROFILES

03 The top eight, side by side



RANK 1

UBS

130/288 answers · 95% CI 39.5–50.9%

1.9	19.4%	2.3%
first-mention position	owned-domain citation (56/288)	citation share

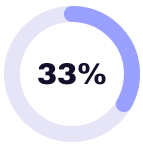


RANK 2

J.P. Morgan

106/288 answers · 95% CI 31.4–42.5%

2.1	14.6%	1.6%
first-mention position	owned-domain citation (42/288)	citation share

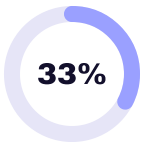


RANK 3

Campden Wealth

96/288 answers · 95% CI 28.1–39%

1.9	13.5%	1.5%
first-mention position	owned-domain citation (39/288)	citation share

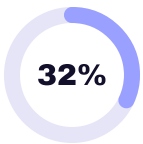


RANK 4

Goldman Sachs

94/288 answers · 95% CI 27.5–38.3%

2.8	15.3%	1.7%
first-mention position	owned-domain citation (44/288)	citation share



RANK 5

Northern Trust

92/288 answers · 95% CI 26.8–37.5%

2.7	14.9%	1.6%
first-mention position	owned-domain citation (43/288)	citation share

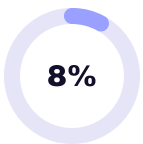


RANK 6

Knight Frank

30/288 answers · 95% CI 7.4–14.5%

3.2	1.7%	0.2%
first-mention position	owned-domain citation (5/288)	citation share

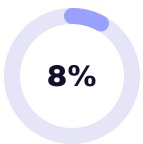


RANK 7

Family Wealth Report

23/288 answers · 95% CI 5.4–11.7%

2.1	5.9%	0.6%
first-mention position	owned-domain citation (17/288)	citation share



RANK 8

EY

23/288 answers · 95% CI 5.4–11.7%

3.6	5.2%	0.5%
first-mention position	owned-domain citation (15/288)	citation share

04

HOW THE ENGINES DIFFER

Same questions, different answers

All four engines returned grounded answers to all 72 prompts. ChatGPT named the large banks most often, with UBS at 44 of 72 (61.1%), Goldman Sachs at 42 of 72 (58.3%) and Northern Trust at 37 of 72 (51.4%). Claude named Goldman Sachs in 13 of 72 (18.1%) and Northern Trust in 10 of 72 (13.9%). On Perplexity, J.P.

ChatGPT

	72 ASKED	72 RETURNED	72 GROUNDED
UBS			**61.1%**
Goldman Sachs			**58.3%**
Northern Trust			**51.4%**
J.P. Morgan			**41.7%**
Campden Wealth			**40.3%**
EY			**13.9%**

Claude

	72 ASKED	72 RETURNED	72 GROUNDED
UBS			**41.7%**
Campden Wealth			**36.1%**
J.P. Morgan			**33.3%**
Goldman Sachs			**18.1%**
Northern Trust			**13.9%**
Bloomberg			**6.9%**

Gemini

	72 ASKED	72 RETURNED	72 GROUNDED
UBS			**55.6%**
Northern Trust			**41.7%**
Campden Wealth			**37.5%**
J.P. Morgan			**34.7%**
Goldman Sachs			**29.2%**
Knight Frank			**18.1%**

Perplexity

	72 ASKED	72 RETURNED	72 GROUNDED
J.P. Morgan			**37.5%**
Goldman Sachs			**25%**
UBS			**22.2%**
Northern Trust			**20.8%**
Campden Wealth			**19.4%**
WealthBriefing			**11.1%**

GOOGLE AI OVERVIEWS

05 The fifth engine

Google AI Overviews were captured through 72 U.S. desktop searches and scored only where an overview appeared, so five-engine figures use 288 + 58 = 346 answers.

TRIGGER RATE



Google showed an AI Overview for 58 of 72 lookups (80.6%, CI 70–88%). The other 14 returned no overview, and none failed. Within the 58 overviews, J.P. Morgan was named in 15 (25.9%), UBS in 9 (15.5%) and Campden Wealth in 8 (13.8%). Goldman Sachs and WealthBriefing were each named in 4 of 58 (6.9%), and Northern Trust in 1 of 58 (1.7%). For the question on hiring a chief investment officer, no overview appeared in any of 3 lookups. Overviews drew more on community sources than the four engines did. Community and social sites made up 13.1% of overview citations, and linkedin.com was the most-cited overview domain. Of 168 Google AI Overview citations, company and brand sites supplied 103 (61.3%), trade and specialist press 23 (13.7%) and community and social sites 22 (13.1%).

FIVE-ENGINE RANK (FOUR-ENGINE RANK IN ARROWS)

1	UBS	40.2%	=
2	J.P. Morgan	35.0%	=
3	Campden Wealth	30.1%	=
4	Goldman Sachs	28.3%	=
5	Northern Trust	26.9%	=
6	Knight Frank	9.2%	=
7	Family Wealth Report	7.2%	=
8	Bloomberg	6.9%	▲ 1

06

LEADERS BY QUESTION

Who each question surfaces first

Six questions from the set. Each tile uses that question's own four-engine answers as the denominator.

Q01 · 12 ANSWERS

Campden Wealth 50%

EY	33.3%
UBS	16.7%

AI Overview shown on 3 of 3 searches

Q02 · 12 ANSWERS

J.P. Morgan 83.3%

Northern Trust	75%
Goldman Sachs	58.3%

AI Overview shown on 3 of 3 searches

Q03 · 12 ANSWERS

Goldman Sachs 50%

TIED WITH NORTHERN TRUST

Northern Trust	50%
UBS	33.3%

AI Overview shown on 3 of 3 searches

Q04 · 12 ANSWERS

UBS 66.7%

Northern Trust	50%
Goldman Sachs	41.7%

AI Overview shown on 2 of 3 searches

Q05 · 12 ANSWERS

UBS 100%

Goldman Sachs	75%
J.P. Morgan	58.3%

AI Overview shown on 2 of 3 searches

Q06 · 12 ANSWERS

Campden Wealth 58.3%

UBS	50%
WealthBriefing	33.3%

AI Overview shown on 3 of 3 searches

07

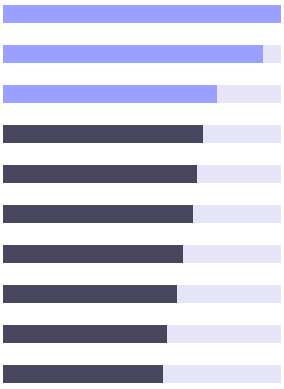
WHO THE ENGINES CITE

Most-cited domains

Of 2,932 four-engine citations, company and brand sites supplied 1,757 (59.9%), trade and specialist press 248 (8.5%), directories and rankings 215 (7.3%), research and data providers 165 (5.6%) and general news and business press 72 (2.5%).

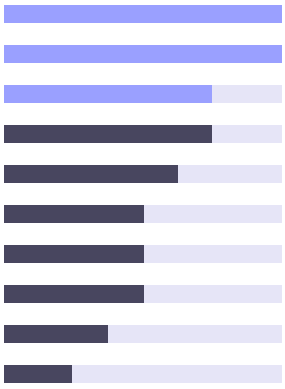
FOUR AI ENGINES · SHARE OF 288 GROUNDED ANSWERS

en.wikipedia.org	**19.4%**
ubs.com	**18.1%**
deloitte.com	**14.9%**
northerntrust.com	**13.9%**
campdenwealth.com	**13.5%**
andsimple.co	**13.2%**
altss.com	**12.5%**
pwc.com	**12.2%**
dakota.com	**11.5%**
aleta.io	**11.1%**



GOOGLE AI OVERVIEWS · SHARE OF 58 OVERVIEWS

linkedin.com	**13.8%**
masttro.com	**13.8%**
fundcount.com	**10.3%**
familywealthreport.com	**10.3%**
assetvantage.com	**8.6%**
youtube.com	**6.9%**
dakota.com	**6.9%**
deloitte.com	**6.9%**
creativeplanning.com	**5.2%**
investmentnews.com	**3.4%**

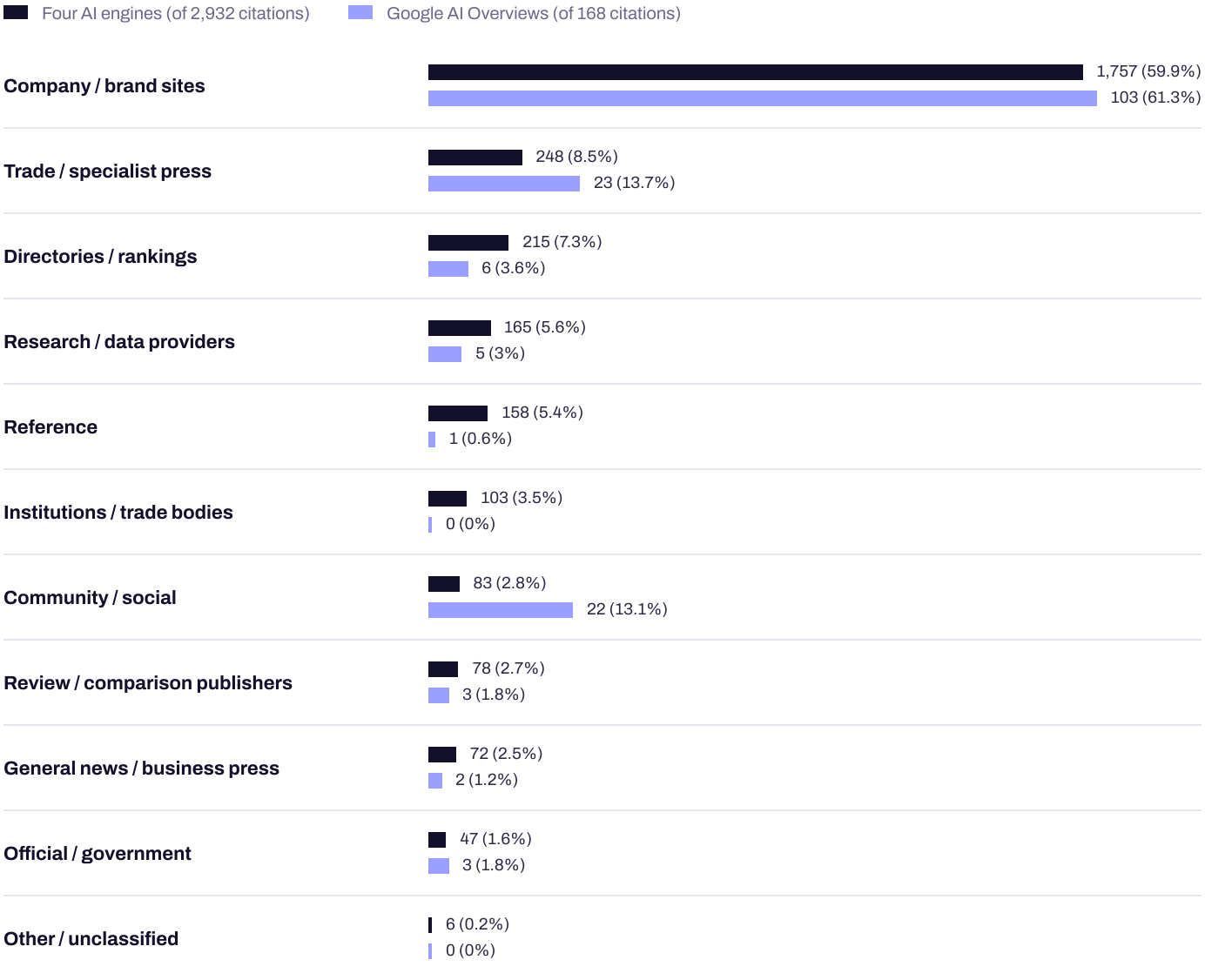


07

WHO THE ENGINES CITE

Citation share by source type

Share of all citations by the type of site cited. Source types were reclassified on October 29, 2026. 'Company / brand sites' now covers only the official sites of companies, brands and schools; publishers, directories, trade bodies and other sites have their own types, and sites that could not be placed are 'Other / unclassified'.



07

WHAT THE DATA SUGGESTS

How can names improve their AI visibility?

These steps follow from the measured results above. They describe what the engines cited in this study and are not a guarantee of results.

STEP	WHAT THIS STUDY MEASURED
Put your facts on your own domain.	UBS's own domains were cited in 19.4% of grounded answers, Goldman Sachs's in 15.3% and Northern Trust's in 14.9%.
Keep your facts accurate on the sites engines cite.	The most-cited sites other than the tracked names' own were en.wikipedia.org (in 19.4% of grounded answers), deloitte.com (14.9%), andsimple.co (13.2%), masttro.com (12.8%) and altss.com (12.5%). Trade and specialist press supplied 8.5% of citations and directories and rankings 7.3%.
Check each engine separately.	ChatGPT named Goldman Sachs in 58.3% of answers against 18.1% on Claude. ChatGPT named UBS in 61.1% of answers against 22.2% on Perplexity.
Do not ignore video and community sites.	Community and social sites supplied 13.1% of Google AI Overview citations against 2.8% in the four chat engines. linkedin.com was cited in 13.8% of overviews, youtube.com in 6.9% and reddit.com in 3.4%.
Re-run the same questions every month.	Compare counts and intervals, not ranks. The 24 questions are in the appendix.

QUESTIONS PEOPLE ASK

08 Frequently asked questions

Q1 Which organization do AI engines name most often on family-office questions?

UBS, at 130 of 288 four-engine answers (45.1%, CI 39.5–50.9%). Its interval overlaps with J.P. Morgan's (106 of 288, 36.8%), so the two cannot be separated statistically.

Q2 How often does Google show an AI Overview for these questions?

An overview appeared for 58 of 72 lookups (80.6%, CI 70–88%). J.P. Morgan was the most-named tracked entity within those overviews, at 15 of 58 (25.9%).

Q3 Do the engines cite dedicated family-office trade publications?

Rarely. Trade and specialist press made up 122 of 2,932 four-engine citations (4.2%). campdenwealth.com was cited 44 times. Family Wealth Report's domain received 19 citations (0.6%), and the Financial Times received none. Of 2,932 four-engine citations, company and brand sites supplied 1,757 (59.9%), trade and specialist press 248 (8.5%) and directories and rankings 215 (7.3%).

Q4 What kinds of sources do the engines cite most?

Of 2,932 four-engine citations, company and brand sites supplied 1,757 (59.9%), trade and specialist press 248 (8.5%) and directories and rankings 215 (7.3%). The single most-cited domain was en.wikipedia.org, with 93 occurrences across 56 of 288 answers (19.4%).

Q5 Do the engines differ in which banks they name?

Yes. ChatGPT named Goldman Sachs in 42 of 72 answers (58.3%), while Claude named it in 13 of 72 (18.1%). Perplexity named UBS in 16 of 72 (22.2%), compared with 44 of 72 (61.1%) on ChatGPT.

Q6 Which names outside the tracked list appeared often?

Citi Private Bank (count 44), Rockefeller Capital Management (41), Bessemer Trust (29), Family Office Exchange (26) and Deloitte (25) were the most frequent untracked names.

METHODOLOGY

09 How this study was measured

24	×	3	×	4	=	288	+	72
questions		runs each		AI engines		answers		Google searches · 58 AI Overviews

24 questions, each asked 3 times on each engine, measured October 26, 2026. Market: United States, English. The destination site was not mentioned to any engine. Entities count as named when they appear in the answer text or the extracted entity list; products, imprints and research arms roll up to their parent.

ENGINE	MODEL IDS CALLED	ASKED	RETURNED	GROUNDED
ChatGPT	gpt-5-mini	72	72	72
Claude	claude-sonnet-5-5	72	72	72
Gemini	gemini-3.7-flash	72	72	72
Perplexity	sonar-pro	72	72	72
Google AI Overviews	DataForSEO Google SERP (live, advanced)	72	58 shown	58

Own-domain citations count a domain plus all its subdomains, with the same rule in every table.

METRIC DEFINITIONS

- Appearance rate: answers naming the entity ÷ answers returned, with Wilson 95% intervals.
- First mention: average order in which the entity first appears (1 = first).
- Own-domain citation: grounded answers citing the entity's domains ÷ grounded answers.
- Citation share: citations to the entity's domains ÷ all citations.

LIMITATIONS

- Measured on one day, October 26, 2026. Answers came from each engine's API (model IDs above); the consumer apps can answer differently.
- The question set has 24 questions with 12 four-engine answers each, so per-question figures rest on small counts.
- Names are counted when they appear in an answer's text, so longer forms such as legal company names (for example "Meta Platforms, Inc." or "Ralph Lauren Corporation") count toward the brand.
- Google AI Overviews were looked up 3 times per question and are scored only on the 58 lookups where an overview appeared.
- Source-type labels are category assignments per domain, and some domains could reasonably fit more than one type.
- Intervals treat each answer as independent, so they understate uncertainty for the 24 repeated questions.
- Source types were reclassified on October 29, 2026: 'Company / brand sites' now means only official company, brand or school sites. Name counts did not change.

APPENDIX

A The 24 questions

Questions marked "Core question" are the original study questions, asked word for word. The others are added neutral questions.

#	QUESTION	GROUP	SOURCE
01	How many family offices are there worldwide?	Family offices	CORE QUESTION
02	How do I set up a single-family office?	Family offices	CORE QUESTION
03	What is the difference between a single-family office and a multi-family office?	Family offices	CORE QUESTION
04	How should a family office structure its investment committee?	Family offices	CORE QUESTION
05	How much do family offices typically allocate to private equity and alternatives?	Family offices	CORE QUESTION
06	What are the best sources of research and data on family offices?	Family offices	CORE QUESTION
07	What publications cover the family office industry?	Family offices	CORE QUESTION
08	How do family offices plan for succession to the next generation?	Family offices	CORE QUESTION
09	What are current trends in family office direct investing?	Family offices	CORE QUESTION
10	Which banks offer services for family offices?	Family offices	CORE QUESTION
11	What reports track family office investment performance each year?	Family offices	ADDED QUESTION
12	How much does it cost to run a single-family office?	Family offices	ADDED QUESTION
13	What is the minimum wealth needed to start a family office?	Family offices	ADDED QUESTION
14	How do family offices invest in real estate?	Family offices	ADDED QUESTION
15	What are the main risks family offices face?	Family offices	ADDED QUESTION
16	How do family offices hire a chief investment officer?	Family offices	ADDED QUESTION
17	What governance documents does a family office need?	Family offices	ADDED QUESTION
18	How do family offices approach impact investing?	Family offices	ADDED QUESTION
19	Which conferences do family office professionals attend?	Family offices	ADDED QUESTION
20	How do family offices handle cybersecurity?	Family offices	ADDED QUESTION
21	What technology platforms do family offices use for reporting?	Family offices	ADDED QUESTION
22	How are family offices regulated in the United States?	Family offices	ADDED QUESTION
23	Where do family offices find co-investment opportunities?	Family offices	ADDED QUESTION
24	How do family offices measure investment returns?	Family offices	ADDED QUESTION

5W

5W PUBLIC RELATIONS · RESEARCH

Retrieval Index: Family Offices 2026

Measured October 26, 2026 across ChatGPT, Claude, Gemini, Perplexity and Google AI Overviews.

WEB
5wpr.com

RESEARCH
5wpr.com/research