

ALERTS

Family Offices: Unique Capital Allocation And Structuring Considerations

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Charlotte Estate & Wealth Transfer Associate Thomas Cooper's recent article was featured in the *Private Wealth*, titled, "Family Offices: Unique Capital Allocation And Structuring Considerations" This article discusses family offices, and the investment professionals serving them, have long been participants in traditional M&A transactions. Of late, however, middle market and lower-middle market family offices are experiencing an increased migration of private equity professionals from traditional private equity funds. This migration has prompted an increased need for investment professionals (*and their advisors*) to consider the often-perceived sleepy legal field of trusts and estates when structuring both a family office itself and its transactions.

At their core, trust and estate arrangements address the questions of control over and beneficial interests in family wealth. These foundational principles guide how family offices and their transactions are best designed.

To read the full article, [click here](#).