

FAMILY OFFICE & PRIVATE INVESTMENT

We are one of the largest groups in the country representing family office clients in both traditional and cutting-edge estate and tax planning transactions across multiple generations.

Family offices have long been in existence, but the modern family office landscape has undergone significant transformation in recent years. As family offices proliferate and become more complex, practical advice and extensive experience relating to their formation and operation is critical. One of the largest groups of its kind in the country, the Wealth, Trust & Estate Planning group has been an integral part of these developments.

Our family office clients regularly engage in both traditional and cutting-edge estate and tax planning transactions across multiple generations. In addition, our family office clients are increasingly engaging in private investments. Family office private market transactions can, in many cases, be indistinguishable from traditional private equity counterparts. However, unlike traditional private equity, family offices often have limited outside investors and the luxury of being able to invest patiently on behalf of family members and future generations who are less focused on an immediate return. We are equipped to provide the market knowledge, multi-disciplinary services offered, and experienced perspective to achieve these objectives.

Areas of Focus

- Investment vehicle and tax structuring
- Governance and succession
- Mission statements
- Family education seminars
- Charitable giving
- Commercial contracts
- Compensation and employment matters
- Securities laws and regulatory considerations
- Concierge services
- Comprehensive wealth, trust and estate planning for client families
- Consolidation, simplification and enhancement of family trusts and entities
- Tax compliance
- Elimination or minimization of probate for clients to maintain privacy
- Life insurance
- Asset protection

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- Premarital and postnuptial agreements
- State residency and trust income taxation
- Vacation residence ownership and management
- Commercial property ownership and management