Private Client, Family Offices & Private Trust Companies

Family Offices

Family offices allow high-net-worth families to consolidate management and administration of their personal, business, tax and charitable concerns. The very scale of these offices, however, creates complexities that span numerous legal disciplines. Federman's private client team has extensive experience structuring and advising many of the oldest and largest family offices in the United States and abroad. We serve as trusted advisors to family office clients by helping them navigate these complex legal issues, with the ultimate goal of identifying potential problems before they occur and creating unique solutions to help each family office achieve its objectives.

Comprehensive Legal Counsel for Family Offices

Acting as the family office’s private general counsel, we draw on the experience of lawyers throughout the firm to provide clear answers to our clients’ most pressing questions. While our work with new family offices typically focuses on tax-efficient family office structuring and maximizing estate planning opportunities, the lawyers in our family office practice continue to counsel clients on the many other legal issues that face family offices every day, including federal, state and local income tax planning and compliance, fiduciary and trust accounting issues, securities regulation and compliance with the SEC family office exemption, structuring of pooled investment vehicles, private foundation creation and administration, privacy and data protection, litigation and alternative dispute resolution, employment compliance for household and family office staff, and the hiring of local counsel to handle real estate transactions, divorces and other personal legal needs.

Private Trust Companies

Federman assists family offices in creating private trust companies to maintain independence and control without the attendant expense and involvement of outsider public trust companies. We are familiar with grantor and beneficiary favorable jurisdictions and maintain strong working relationships with lawyers in Wyoming, New Hampshire, Delaware, Nevada and South Dakota.

Individual Wealth Conservation and Protection

For high net worth individuals, including entrepreneurs, executives, celebrities and athletes, amassing and retaining wealth will always be important objectives. Our private client attorneys provide personal attention marked by a focus on issues and services common to this group of clients. We work to anticipate and solve matters of concern, while delivering integrated personal and business planning solutions.

Sophisticated Planning for High-Net-Worth Individuals

From structuring investment vehicles to income tax planning and charitable giving, Federman attorneys have substantial experience advising high net worth individuals on managing their affairs and effectively planning for the future. To help clients achieve their financial goals, we structure and supervise family business and investment entities, intergenerational wealth transfers, private trusts and investment partnerships, all with an eye on reducing or eliminating estate, gift and generation-skipping transfer taxes and avoiding fraudulent conveyances. As proactive advisors, we help clients protect their business assets from creditors through the proper use of sophisticated domestic and offshore asset-protection strategies and vehicles.

KEY CONTACTS

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