

FAMILY OFFICE



STONEHAGE
FLEMING

NOW AND FOR FUTURE GENERATIONS

EMPOWERING YOUR FAMILY

Most wealthy families recognise the challenges of protecting and growing their wealth in a fast changing world.

They also acknowledge the need to consider how to transfer their assets fairly and equitably to the next generation, to set a clear strategy and to prepare future leaders.

One of the roles of a family office is to support a family in addressing all these issues, but also to help them understand that every major decision has to be considered in light of a wide range of factors. These decisions require broadly based expertise and experience, to protect the interests of all family members.

For these reasons, Stonehage Fleming encompasses an unusually wide range of advisory, technical and operational capabilities that can help navigate even the most complex of circumstances - covering everything you would want from your own family office and a lot more.

We provide families with peace of mind and time, two very valuable commodities in today's world. We specialise in the successful transfer, protection and management of generational wealth for the long-term.



As one of the world's leading international family offices we are the trusted advisers to international families with significant business and/or lifestyle assets.

Many families take advantage of our scale and experience to access a broad array of skills, which would be very costly to replicate in a single family office of their own. Where a family already has its own family office our team will complement the skills they have in-house and work alongside their existing advisers to ensure a successful intergenerational strategy.

A UNIQUE SERVICE FOR EACH FAMILY

Many businesses claim their service is tailored to the individual needs of clients.

For a family office however, the range of services required by different families varies so much, according to their circumstances, that there can be no standard offering and the service really is designed to meet the requirements specific to your family.

Whilst no two families are the same, their histories, number of generations and locations, the nature of the principal assets (especially where there is a family business) and the aptitudes of senior family members will all be key factors.

Almost without exception, families have in common the need to plan the practicalities of passing the baton from one generation to the next and laying the foundations for an enduring legacy. This recurrent theme defines our approach and plays a key part in the day-to-day management of wealth and other family arrangements.



CORE CAPABILITIES



STRATEGIC ADVICE

Each family has access to a key adviser.

In addition to a relationship manager, responsible for the day-to-day management of a family's requirements, each family has access to a 'key adviser' who is there to support the relationship manager for regular reviews and when significant decisions have to be made.

The object of this is to bring a fresh perspective to the debate and to challenge thought processes, supported by extensive experience acquired through working with other families facing similar situations.

Key advisers are, without exception, highly qualified, often with a background in accounting or law, as well as many years' experience advising families.

WORKING WITH PROFESSIONAL PARTNERS

We routinely work with fellow professionals from a variety of disciplines.

Our focus is to ensure we develop strong, mutually beneficial relationships. The key driver is to ensure that the client receives the right advice. The benefit of our extensive network is that we have access to any specialist the client requires, anywhere in the world.

- We recognise and respect the value of a client's existing relationships and regularly work alongside a client's trusted advisers.

- We strategically plan for our clients and engage with their wider advisers to provide the highest level of service for every aspect of their needs.
- We routinely work with fellow leading professionals from a variety of disciplines across the international jurisdictions.
- We coordinate the implementation of advice for our clients and ensure their continued needs are addressed.

HOLISTIC RISK MANAGEMENT AND REPORTING

Clients come to us with an array of reports covering a variety of assets, often held through various structures and with different beneficiaries.

Furthermore the family leader often stores too much important information in their own head, and needs to consider what would happen should he or she no longer be at the helm.

The challenge is to collate all this data into a clear picture, which forms the basis for strategic decision making in support of agreed family objectives and enhances family communication where required.

An accurate and well-designed record of a client's assets and structures is fundamental to establishing the purpose, the objectives and the management of a family's wealth. The Stonehage Fleming Family Office provides a full range of high quality administration and reporting services. We generate flexible, bespoke

reporting that enables clients to analyse assets and liquidity across currencies, sectors and jurisdictions as well as ownership profiles.

Disciplined reporting forms the basis of successful intergenerational wealth preservation and our systems allow family groups and decision-makers to access consolidated reporting for everything from strategic overviews to fine-detail analyses. Combining both intelligence and technology, we ensure that our clients are always in possession of the complete picture, giving peace of mind to family members concerned. This is especially important for busy international families with complex arrangements, who may not have the time to set-up, manage and access comprehensive and meaningful reporting structures.

CONTACT US

There is no substitute for a personal conversation.
If you are interested in hearing more, please get in touch.
enquiries@stonehagefleming.com



[STONEHAGEFLEMING.COM](https://www.stonehagefleming.com)

This service brochure has been prepared for information only. The views and opinions expressed are for information purposes only, and are subject to change. It is neither an offer to sell, nor a solicitation to buy, any investments or services. It does not constitute a personal recommendation and does not take into account the individual financial circumstances, needs or objectives of the recipient. There is no representation or warranty as to the accuracy of, nor liability for, decisions based on such information. The distribution or possession of this document in certain jurisdictions may be restricted by law or other regulatory requirements. Persons into whose possession this document comes should inform themselves about and observe any applicable legal and regulatory requirements in relation to the distribution into, or possession of this bulletin, in that jurisdiction and any overseas recipient should consult its professional advisers as to whether it requires any governmental or other consents or if it needs to observe any other formalities to enable it to receive or respond to this communication. It has been approved for issue by Stonehage Fleming Financial Services Limited, a company authorised and regulated in the UK by the Financial Conduct Authority (FCA). Stonehage Fleming Trust Holdings (Jersey) Limited is regulated by the Jersey Financial Services. This bulletin is approved for issue in South Africa by Stonehage Fleming Financial Services (Proprietary) Limited, an authorised Financial Services Provider (FSP9587). No part of this publication may be reproduced, stored in a retrieval system, or transmitted, on any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission.

Copyright at Stonehage Fleming 2021. All rights reserved.

Printed on FSC and PEFC accredited material
Be Carbon Neutral

