

MSM FAMILY OFFICE APPROACH



- We work closely with our families to help simplify their financial affairs to ensure they are easily understood by all family members. We help structure, manage and monitor the investments of our clients by aligning our services to meet their objectives
- We actively seek specialist advisors and open architecture solutions to ensure our clients are provided with the most appropriate and relevant advice
- We partner with trust and fiduciary specialists and boutique investment managers to deliver an integrated family office service

MSM FAMILY PLANNING AND GOVERNANCE

“Shirt sleeves to shirt sleeves in three generations”

The passing of the patriarch / matriarch can be the biggest threat to a family’s wealth. Taxes, family infighting, management disarray can singly or jointly destroy material wealth. Whether the family wealth stays under one umbrella or whether individual members pursue independent interests, there must be a plan or mission statement for future generations to follow

MSM works seamlessly with family advisors and trust administrators on family governance issues to ensure families control their affairs whilst reducing costs and complexity

MSM reviews existing and/or develops new structures to ensure they meet the families’ vision while adhering to relevant tax and legal considerations

MSM can act as protector or investment advisor to family structures where institutional service providers are unable or reluctant to serve