

# 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

## CASE STUDY - TRANSFER PLANNING

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**Background** - Middle Eastern family with a substantial portfolio of financial and real estate assets required a family office to work with their institutional trustee to help administer the multiple family structures holding globally diversified assets.

**Consolidation:** provides monthly cash statements and quarterly reports reconciling banks statements and maintaining all official records of family structures.

**Oversight:** oversees the administrators and real estate managers to ensure accurate and timely tax returns are filed and they properly fulfil their fiduciary duties.

**Next Generation:** works with the legal advisors to ensure current and new structures are relevant and efficient during the patriarch's lifetime and will pass seamlessly to the next generation after his lifetime

**Reporting and Monitoring:** pro-actively provides adhoc and monthly information on all the structures and monitors activities for the family within each structure

## CASE STUDY - LIQUID AND ILLIQUID ASSET MANAGEMENT

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**Background** - A wealthy family required a family office to manage and administer their real estate homes, private jet, fine wines and luxury cars. They approached MSM to provide concierge and investment management services.

**Consolidated Reporting:** prepares monthly statements of the families' liquid and illiquid assets

**Inventory:** catalogues and actively monitors all illiquid assets

**Expense Management:** tracks expenses and provides monthly overview of expenses

**Next Generation:** works with the legal advisors to ensure all records and structures are current and relevant during the patriarch's lifetime and will pass seamlessly to the next generation after his lifetime