Family Office Practice

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Practice

STRADLEY RONON

OUR EXPERIENCE

Stradley Ronon's family office practice provides clients with the advice they need to meet their unique challenges and achieve their long-term goals, including establishing their business and investment platforms. From building single-family and multi-family office organizational structures to providing related regulatory guidance, we offer a sophisticated understanding of:

- Customized investment platforms
- International investment and tax structures
- Implementation of novel partnership and joint venture structures
- Protection from potential liability
- Creation of strategic approaches to raising capital

We advise family offices on a broad range of investment activities, from private equity and hedge fund investments to co-investments and direct investments. Family offices frequently call on us concerning investments in traditional asset classes such as private equity, real estate and venture capital, and concerning alternative asset strategies, including emerging markets investments, private credit, digital assets and blockchain, art and other collectibles, and cleantech and renewable energy investments.

OUR SERVICES

Our representation includes:

- Asset Management Counseling
- Complex Trust and Estate Planning
- Establishing Family Service Companies
- Planned and Charitable Giving and other Philanthropic Endeavors
- Regulatory Compliance
- Risk Management and Employment Matters
- Strategic Tax Planning and Transaction Strategies
- Succession Planning and Governance Structures

Our Representative Matters*

We have represented several family offices in connection with their investment platform implementation and related investment activities, including a:

Large international multi-family office in building out a U.S. private equity investment platform to invest in telecom-related assets and rollups, and related structuring and regulatory guidance to fit within SEC investment advisor registration exemptions, as well as exemptions from CFIUS review; this representation also involved the formation of related carry entities and advice on compensation structures for the U.S. management team.

$250 million private equity fund formed by a family office to invest in high-growth-potential health care companies across various life cycle stages, particularly those in the neuro-musculoskeletal space.

In addition, we often make strategic introductions for our family office clients through our established network, including introducing them to potential funding sources, co-investment partners, consultants, key employees and third-party vendors. Our attorneys draw upon the firm's multi-disciplinary capabilities in mergers and acquisitions, private equity, real estate, taxation, intellectual property, philanthropy, investment management, finance, and trusts and estates to offer comprehensive advice to our clients.

OUR APPROACH

Stradley Ronon is regarded as a trusted legal advisor by our established family office clients on complex intergenerational wealth management issues and related challenges. Our view is holistic when working with families to create or improve their family office platforms. We recognize that successful family offices focus on more than just the preservation and transfer of wealth between generations. The family office can serve as a platform for transferring wealth creation and management skills between generations. The family office can also establish a lasting legacy through investment principles that reflect a family's core values, such as social impact investing and entrepreneurship. The family office governance and succession structures often serve a crucial role in mitigating the potential for intrafamily disputes. Our attorneys act as seamless advisors to the family office in all these respects, whether coordinating with or reporting to various family members or other internal and external advisors.

Senior executive in building out a tax-efficient, single-family office management company to make investments in energy and financial services companies through a multi-class family investment vehicle.

Retired hedge fund manager in forming a single-family office investment platform and in related estate planning work.

Compilation of several family offices in **reviewing investment transactions in private funds and emerging companies**, and advising on SEC and CFTC family office registration exemptions.

Foreign family office transitioning certain family members' residency to the U.S. and advising on related tax planning and other strategic issues.

**Includes representations by attorneys before joining Stradley Ronon.*

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For more information on our Family Office practice, visit www.stradley.com/family-office.

CONTACT

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ABOUT STRADLEY RONON

For more than 95 years, Stradley Ronon has helped private and public companies – from small businesses to Fortune 500 corporations – achieve their goals. With eight offices and more than 200 attorneys, Stradley Ronon is proud to help companies manage their legal challenges and grow their businesses.

www.stradley.com

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