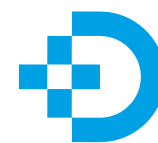


Davos
Financial Group:
**FAMILY OFFICE
BREAKDOWN**



Family wealth is a difficult capital to manage, juggling between administrative roles to financial investments and savings plans while operating a successful business can be time expensive and arduous. Family offices offer ultra-affluent families a peace of mind with their financial wealth by having a comprehensive team of professionals' plan, advice, concierge, and comprehensive solutions in the most lucrative means available. To understand what a family office is we need to first clarify the two main differences in family office types, single family, or multifamily offices.

Single family offices focus their team exclusively on one high wealth family client that requires a multitude of management services not limited to financial necessities. Multifamily offices are comprised of multiple family clients that are served by a large team of wealth management and services professionals taking care of the group's wealth while respecting their individual clients' interests.



Additionally, by aggregating their investable assets, they meet the criteria of having a family office in place to manage their wealth as well as save costs. The goal of any family office is to ensure that a family's wealth is preserved, grown, and passed down generations so that sacrifices made by parents can be continuously enjoyed to by their inheritors.

What makes family offices effective?

Family offices can operate with speed and flexibility in a way that traditional investment firms cannot.

Many family offices do not have a formal mandate or even an investment committee. The strategic goals are left to the choice of the principals, and as such, investments can be made much more quickly, and unique structures can be deployed.

Family offices are also very flexible on the exit of their investments since they are often longer-term holders, which can be a valuable asset to have in a capital structure. Furthermore, family offices are often natural buyers as companies scale and grow, especially to a family office



whose principal has deep domain expertise.

How do family offices operate?

Most multi-family offices employ a core staff, who coordinate with outside professionals to provide solutions to the full range of a family's financial and lifestyle needs. Ultra-affluent families who prefer multi-family offices expect responsiveness, top tier service, and a staff that can not only respond to issues promptly but anticipates potential issues and have solutions ready. Multi-family offices personalize investments to fit the needs and risk profiles of member families. Investments may include commercial real estates, hedge funds, private equity, and venture capital opportunities.

The staff of a multi-family office often includes investment managers, financial advisors, and various administrative, legal, and tax advisors. As multi-family offices can have anywhere from

two to over a hundred clients, staff sizing will vary considerably. Regardless of the number of families served, a dedicated small team should be assigned to work with you. Most multi-family offices charge an asset-based fee or flat retainer rate that covers all services offered by the office.

How to determine which to choose?

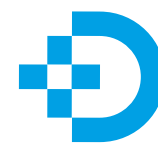
Anyone looking to put their family's wealth in the hands of another would want to be clear that their investment is in safe hands. Reputation and history are some of the first signs to look at in choosing a financial partner you can trust, but there are also other factors to account for in finding the right fit, its best to start first clarifying what your goals are. What type of growth are you looking to gain, how risk averse are you, what are the specific needs of your family or properties?

These questions and more should have a clear and precise answer for you to then examine the different investment, financial, household, and structural tasks that you wish to embark on. Review the different goals and tasks listed below to measure the necessities and objectives in allying with a family office.

Budget Expense Structure
Payment Control
Security Systems

Reputation
Management
Branding
Social
Responsibility





Accounting System
Administrative System
Tax Planning
Financial Reporting

Project Evaluation
Business Plans
Business Advisory

Estate Planning
Retirement Plan
Asset Management
Financial Advisory

Legal Structure
Insurance Plan
Legal Advisory

Family Governance
Strategic Management
Mediation Process
Our Multifamily Office

Since our formation in 1993 we have provided our clients with an elite level of services and growth managed to their specificities. We respond to the current and future needs of each of our clients regarding legal, accounting, reputational and financial,

matters. Guarantee not only the increase and preservation of family heritage in the short, medium, and long term, but also the implementation of an optimal family government policy that facilitates and regulates the decision-making process. By conceptualizing, developing and executing the strategic plan to be implemented in the creation and management of the family office providing a wide array of services and typically oversee our clients' entire financial universe with

assistance in its structuring and administering in an optimal fashion. As well as planning the family's goals in the most tax efficient manner. We provide a wide array of advice and assistance with a multitask team of professionals specialized in certain topics and new age tech and methodology. We make it our mission to give you and your family the certainty in your financial future and management to afford you the tranquility of finally getting to enjoy your capital.





Contact us |
info@davosfinancial.com