One Firm Worldwide℠

FAMILY OFFICE SERVICES

Family offices provide valuable administrative, investment, planning, and compliance services to their clients, who may be members of a single family or of several families. Jones Day attorneys have significant experience advising both single- and multi-family offices and their clients with respect to the broad range of complex and sophisticated issues that are specific to these types of entities. Our breadth of experience enables us to help our clients find creative approaches that go beyond traditional estate and succession planning. The Firm's experienced lawyers can assist with:

- Establishing and structuring the family office and its governance arrangements.
- Establishing an equitable and tax-efficient methodology for allocating among clients the costs of operating the family office.
- Negotiating custodial and investment management agreements.
- Creating private investment vehicles for the pooling of investments among family office clients in compliance with the tax rules governing family limited partnerships, the investment fund rules of the Investment Company Act of 1940, and the accredited investor/qualified purchaser rules under the Securities and Commodities Acts.
- Reviewing subscription materials and governing agreements for hedge funds and private equity partnerships.
- Complying with (or seeking a family office exemption from) the Investment Advisers Act of 1940.
- Coordinating tax and estate planning and compliance for multiple family members and entities.

- Coordinating the planning for significant transactions affecting the family, such as the sale of a business or a major exercise of stock options.
- Coordinating charitable planning and administration including the establishment of private foundations and donor-advised funds; compliance with federal and state reporting/record-keeping requirements; and planning and structuring of activities and transactions to avoid liability, including compensation, self-dealing, and conflict-of-interest issues.
- Addressing fiduciary issues for family trusts and charitable foundations, including the establishment of private trust companies, where appropriate.

ADDITIONAL INFORMATION

For additional information regarding our family office services, please contact your principal Firm representative or one of the lawyers listed in this publication. General email messages may be sent using our "Contact Us" form, which can be found at www.jonesday.com.

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