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Family Offices

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Shartsis Friese provides tailored structures for family offices and custom investment platforms.

The firm's Family Office practice advises family offices, principals and high net-worth investors on creating and operating customized investment structures, including stand-alone vehicles to separate managed accounts (SMAs). Our counsel covers fund-like structures, co-investment arrangements and bespoke joint ventures designed to meet each family's investment, governance and succession objectives.

We assist with entity formation, tax structuring and compliance matters, drawing on the firm's cross-disciplinary capabilities in corporate, tax, estate planning and investment management. As necessary, our attorneys work closely with the firm's Family Wealth Planning group to provide an integrated approach for our clients' wealth planning and investment goals. Our approach is pragmatic and personal: we help families and their advisors establish efficient and flexible investment platforms that preserve privacy and align with long-term objectives.