

Family Office Structuring

What is a Family Office?

A Family Office provides administrative, logistical and advisory support to families in need of assistance with their financial and business affairs. A family office can be used to simply handle a pressing wealth management need or can handle other services such as the family requires to optimise its affairs.

Effective family wealth management involves a range of issues related not only to a family's business needs, but also to personal and family goals. Families with a high net worth establish a family office to manage their many investment, reporting, philanthropic, and financial planning responsibilities.

Family offices have increasingly become popular, with high net worth individuals, seeking ways and means to safeguard their accumulated wealth, preserve it within the family, and seek tax efficient manners to pass it on to the future generations.

Most Common Forms of Family Offices

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| Single Family Office | Set up, owned and managed for one family. The original and most expensive model, favoured by the wealthiest and globally active families; |
| Multi-Family Office | Serves more than one family, with the families usually being linked commercially or by common values. Easier to attain economies of scale, so costs can therefore be shared more broadly and it may be easier to hire and retain top professionals; |
| Commercial Family Office Providers | Businesses specialising in the provision of Family Office services, usually private banks, wealth management firms and high calibre professionals. |

Why Choose a Family Office?

- Creation of a single, confidential point of coordination and control for your family affairs;
- Safeguarding against succession and control challenges;
- Navigating through complex international tax laws;
- Provides cost efficiencies and reduced conflict of interest between advisors.

Why Malta?

In past times family offices were located in the same country where the family resided. In most cases now a family office uses holding companies in different jurisdictions or a combination of structures around the globe. The families themselves are far more widespread this including their investment interests and commercial pursuits.

Malta is an ideal jurisdiction that has an effective platform from which a family office can be effectively operated. What attracts many clients to the island is our favourable residency/citizenship programmes, tax laws, investment vehicles, trust companies and legal and accountancy services.

How Zeta Can Help

Zeta offers an array of services to clients looking to set up a family office such as, estate and inheritance planning, consultancy, assisting professional intermediaries in the structuring and management of their clients' affairs. Our services include company management, setting up foundations or trusts, advisory services relating to family office structures and structuring business investments.

Our services cater for both the private individual and businesses alike which include Relocation Services, Transition Services, Property Management and more. At the initial enquiry, we will obtain a comprehensive understanding of your requirements and will provide you with a detailed overview of your options.

For more information on how Zeta can assist you please contact our Business Development team on bd@zeta-financial.com.

Get in touch

Head office: 56, Ground Floor, Europa Centre, St. Anne Street, Floriana FRN 9011
zeta-financial.com

Michelle Oakes

Group Business Development Director

T. +356 2011 9700 E. bd@zeta-financial.com



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