

Table of contents

What is a family office? _____ 7	An adviser's view _____ 99
Ian Macdonald	– private banker
Wright, Johnston & McKenzie LLP	Samy Dwek
Mark McMullen	JPMorgan Chase NA
Smith & Williamson LLP	Paul Knox
	JPMorgan
Establishing the family office ___ 21	An adviser's view _____ 103
Barbara Hauser	– accountant
Barbara R Hauser, LLC	Jonathan L Sutton
	Dixon Wilson
Choice of structures _____ 29	Family offices and _____ 107
Imogen Buchan-Smith	technology: the challenge,
Ashley Crossley	approach and opportunity
Baker & McKenzie LLP	William S Wyman
	Summitas, LLC
Recruitment and talent _____ 43	Family office risk _____ 117
management strategies	management and insurance
MJ Rankin	Linda Bourn
The Rankin Group LLC	Crystal & Company
	Family values, mission _____ 129
Management of the _____ 57	and vision and the family office
family office	Kirby Rosplock
Sandy Loder	Tamarind Partners Inc
AH Loder Advisers Ltd	
	Culture, communication _____ 139
Investment _____ 81	and conflict
Charles Peacock	Ian Marsh
Alex Scott	<i>Familydr</i> Limited
SandAire	
	The journey towards _____ 153
Families working (well) _____ 95	governance
with outside lawyers	Dennis T Jaffe
Joe Field	Independent adviser
Withers Bergman LLP	

Family office governance _____ 167
Hakan Hillerstrom
Independent family business adviser
Ken McCracken
Amelia Renkert-Thomas
Withers Consulting Group

Philanthropy and the family: improving social equity and creating family legacies _____ 179
Gina Pereira
Dāna Philanthropy

The five challenges for wealth inheritors to develop a positive wealth identity _____ 195
Dennis T Jaffe
Independent adviser

The golden rucksack – insights from qualitative research among wealthy heirs _____ 203
Raimund Kamp
Marijke Kuijpers
Guidato Family Office

Next generation wealth and the future of the world _____ 223
Aron Pervin
Pervin Family Business Advisors Inc
Jonah Wittkamper
Nexus Global Youth Summit

The life cycle of the family office _____ 237
Leslie C Voth
Pitcairn

Part II

Australia _____ 245
Keith Drewery
Drewery Consulting Pty Ltd

Canada _____ 261
Mary Anne Bueschkens
Miller Thomson LLP
Lucinda E Main
Beard Winter LLP

The Gulf region _____ 277
Barbara R Hauser
Barbara R Hauser LLC

Hong Kong _____ 289
Christian Stewart
Family Legacy Asia (HK) Limited

India _____ 307
Aditya Gadge
Association of International Wealth
Management of India

Israel _____ 317
Ori Ephraim
O Ephraim Multi Family Office
Services
Lyat Eyal
Aronson, Ronkin-Noor, Eyal Law Firm
Alon Kaplan
Alon Kaplan Law Firm

Netherlands _____ 337
Raimund Kamp
Marijke Kuijpers
Guidato Family Office

Russia _____ 349
Maxim Alekseyev
Kira Egorova
ALRUD Law Firm

Switzerland _____ 361

Robert Desax

Baker & McKenzie, Zurich

Anne Gibson

Boston University School of Law

Marnin Michaels

Baker & McKenzie, Zurich

United Kingdom _____ 371

Grania Baird

Marianne Kafena

Alison Springett

Sarah von Schmidt

Farrer & Co

United States _____ 385

Mary K Duke

Independent adviser to families

About the authors _____ 399