Rother
financial advisory

Case-Study 07-2014

Management of Family Offices

RFA is entrusted with the strategic and operational development of major private assets

The assets of a family, which is often built over several generations, form a treasure that is to be secured and grown - especially in when the financial market is so uncertain. This is a task that we at Rother Financial Advisory (RFA) fulfil in both strategic and operational terms. The RFA approach differs significantly from the equivalent departments at banks. We analyse investment strategies and investments are analysed from a vendor-neutral perspective and develop them in an expert network of tax consultants, auditors and lawyers so that they are ready to be implemented. The focus is also always on organising the Family Office itself and training those who work there accordingly. RFA brings together its expertise and network in the selection of personnel.

Example of the Family Office

From choosing the right Asset Manager to finding the right legal forms for shareholdings and institutions, everything is still covered by the areas that Rother Financial Advisory continues to advise in within the context of the order.

The services offered: Beauty Contest for selecting suitable candidates for the job of the Asset Manager (analysis of profiles, monitoring and selection); working together with the tax advisors, auditors and lawyers involved to safeguard the neutral client perspective; setting up a controlling process for the ongoing operation of the Family Office with external consultants; personal consultation of the family in legal, ethical and strategic issues affecting the investment strategy.

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