

Multi Family Office

Unlocking the opportunities for your multi family office

Introduction

In today's dynamic financial landscape, Multi-Family Offices (MFOs) encounter a spectrum of obstacles, ranging from mounting global regulations to the pressing need for advanced digital solutions and the intricacies of modern investment landscapes, particularly within private markets.

IQ-EQ understands the challenges inherent to MFOs and their unwavering desire to provide excellent client experience whilst managing multiple stakeholders. We have developed an offering based on the MFOs needs, no matter where they may be in their evolution.

Our capabilities enable you to meet your priorities while providing technologically advanced back, middle, and front office services that enhance your clients' experience. We help you meet challenges across every pillar of family office services. We provide:

Our Services



Governance, risk management and compliance

- Access to AML/KYC RegTech SaaS offering powered by MaxComply
- Risk management, compliance, and reporting
- Regulatory hosting platform
- Compliance monitoring, tracking and reporting and LPA reporting
- Tax returns and regulatory filings, FATCA and CRS global reporting
- Gathering information from drawdowns and distributions and producing quarterly reports



Multi-asset consolidated reporting and documentation management

We provide look through portfolio reporting to the individual holding/assets for family office portfolios that have multiple investment advisors and underlying managers. Our document management system ensures that our clients get easy access to core reporting and legal documentation held in a secure single location.

We utilise 16 different technologies and software to ensure we provide a tailored solution for our clients. Clients can then monitor their performance, accounting information and event ESG metrics as well as benchmark these against a variety of indices, all through our online Cosmos solution.



Fund services

We support the establishment, administration, compliance, and accounting for all types of funds structures, including:

- Liquid and illiquid funds
- Co-investment vehicles
- Hybrid funds, private funds, SPVs and cell companies
- Alternative asset fund administration and domiciliation (private equity, real estate, debt, hybrid and hedge)
- Fund management (regulated and unregulated, including private fund co-investment and joint venture structures)
- Regulatory hosting services and intellectual property administration (patents, image rights and others)





Asset holding services

In line with the sophistication of your family, we can structure and administer all asset holding requirements including:

- Private funds
- Carry vehicles
- Trusts, private trust companies
- Family holding companies
- Foundations
- Family investment companies, limited partnerships
- Loan or registered agent services (including equivalent fiducie in France)



CFO support services

Our Chief Financial Officer Support Services assist family offices in establishing and operating a strong accounting and financial reporting infrastructure. We tailor the work around your needs, including accounting and administrator oversight, budgeting and analysis, cash flow control, annual audit process, implementing new finance and operating systems, management of company financial control and budgeting.



Asset protection

We work closely with your specialist advisors to help design suitable global strategies for the protection of wealth, in particular in relation to:

- Compliance within a changing international tax, regulatory and legislative environment
- Family relationships and protection from disputes
- Intergenerational transfer of wealth
- Privacy and reputational considerations



Corporate and trust services

IQ-EQ provides a full suite of corporate and trust services. With expertise spanning various structures, we cater to diverse needs seamlessly; from diverse trust structures to foundations, fiducie, partnerships, companies, and SPVs, we can support all your needs across all key jurisdictions.



Luxury assets

We have a dedicated luxury assets team that can assist with the establishment and administration of holding structures for many types of luxury assets, including cars, yachts, aircraft and art.

We provide:

- Aircraft holding/leasing structures
- Classic car holding structures and management services
- Yacht holding structures
- Structures for holding art collections
- Luxury asset management, secure storage and movement/shipping oversight
- All related regulatory and tax reporting and compliance filings
- Bookkeeping, accounting and accounts/financial statement preparation for all such holding entities (stand alone and consolidated and in line with GAAP)
- Guidance and stewardship for certain employment and permanent residency applications



The private office

We also provide personal concierge, lifestyle and property care services in London including:

- Sourcing and purchasing property
- Property management and security
- Lifestyle services
- Education: Organise private tutors, music lessons, summer camps, coursework, university applications and placement to a desired school or university
- Staffing requirements, no matter how bespoke
- Assist with personal banking
- Assist with private health care
- Manage all travel needs either for business or pleasure, from planning and arranging detailed travel itineraries to yacht and aircraft charters
- Reputation management



ESG services

Having the right ESG framework in place has become a top priority for family offices. We can assist with set up, data acquisition and management.

Key facts and figures*

People worldwide	Worldwide locations	Assets under administration	Minimum senior team experience	Funds under administration
5800⁺	25	\$750⁺ bn	20 yrs	800⁺

Key contacts



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[Click here to learn more](#)

*Correct as of August 2024

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Reference: IH1400_August2024_03
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