

Luxembourg as a Family Office Destination of Choice

Overview

Managing and constructing family wealth has become increasingly challenging with increased regulatory scrutiny and more international mobility of family members. Families have increased their allocation to more complex alternative investments, thus driving the need for sophisticated and global structuring solutions.

Luxembourg has a broad array of investment structures that are appropriate for wealth management, offering both regulatory supervision and flexibility. The jurisdiction provides flexibility to efficiently and compliantly hold and preserve various types of family assets' interests thereby further enabling wealth preservation and succession planning.

Partnering with IQ-EQ Family Office services mobilises a combination of global and local expertise across sectors with cutting-edge technology to enhance the efficacy and support the objectives of your family office.

Supporting your family offices' evolution



Design your family office

We work closely with you and your advisors to determine how best to structure both your family wealth, and the family office.

Build your family office

We establish the required framework quickly and efficiently to support the governance, economic substance level, and efficacy of your family office.

Execute your plan

We collaborate with in-house and external specialist advisors. This can include working in close collaboration with banks, investment managers, luxury asset specialists, insurers, specialist asset administration services and private funds reporting functions.

Guard and facilitate

Our experienced professionals deliver the highest standards of wealth governance and oversight, providing wealth stewardship.

We facilitate smooth administration across all services from company secretary, CFO, trustees, property and lifestyle concierge. In addition, we can leverage our full continuum of professional support through regulatory compliance, technology and reporting.

Our services

Our knowledge and experience provides your family with accurate and timely financial reporting, allowing you to focus on growing and protecting your family's assets for generations to come.

Family office establishment and administration

Set up your family office quickly and efficiently with our range of services:

- Working closely with your advisors to identify your needs and how best to articulate your family's values for future generations
- Helping you and your advisors to establish a Family Office constitution or charter
- Structuring, incorporation and administration of your family office structure
- Provision of company directors and secretary
- Preparation of accounts
- Processing monthly payroll
- Issuing of pay slips and arranging for payment of salaries

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

Asset holding services

In line with the sophistication of your family, we can structure and administer all asset holding vehicles 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)

Multi asset class specialist administration

We support the establishment, administration, compliance, and accounting for all types of private 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
- Intellectual property administration (patents, image rights and others)

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

Asset owners solutions

We understand your back-office and portfolio monitoring needs differ from a fund manager. That's why we are committed to providing you with an array of tailored investment-focused support services.

- Consolidated reporting on all asset classes including daily, monthly, quarterly valuation reporting
- Investment accounting for your portfolio and structures
- Carry and management fee modelling and support
- IQ-EQ Cosmos – financial portfolio monitoring at portfolio, fund, and asset level
- Specialist reporting (ANREV, ILPA, and INREV)
- SPV, co-investment, and pension fund investment administration
- Payment processing and daily cash management

- Online repository services
- AML/KYC documents sent to asset managers using a secured platform
- Guidance and stewardship for certain employment and permanent residency applications

Risk management, compliance and reporting

Ensuring your family office and investment structures comply with the ever increasing regulatory and reporting environment. This can include:

- MaxComply, our adaptable and customisable compliance software helps family offices, families and corporates manage their AML/KYC regulatory activities effectively and efficiently
- Numerous forms of regulatory applications and annual filings in multiple jurisdictions globally
- Monitoring regulatory changes globally to ensure compliance at all times
- Assisting with regulatory licensing and compliance

Legal and tax advice liaison and stewardship

We can connect you with our global network of law firms and tax advisors and project manage the designing of your family office.

CFO support services

Our Chief Financial Officer Support Services provide assistance to 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 company financial control and budgeting

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.

- ESG Set Up
- ESG Data Acquisition and Management

Learn more about our group capabilities

[Click here](#)

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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*Data correct as of August 2024

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