Family Office Practice

Lowenstein Sandler's Family Office Practice counsels wealthy families, based both in the United States and internationally, on a broad array of legal issues raised by the creation, growth, preservation, management, and transfer of their wealth. We recognize that every family office is as unique as the family it serves, and we tailor our advice accordingly.

The group synthesizes numerous areas of our firm's knowledge and experience, allowing us to address seamlessly the most pressing legal issues facing wealthy families. Our areas of focus include:

- Structuring family office ownership and management
- Developing federal, state, local, and cross-border income and transfer tax planning for family entities and individual family members
- Advising regarding direct investments and allocation of capital to third-party managers
- Assisting family offices in complying with the Advisers Act and other federal and state regulatory requirements
- Designing and implementing family and philanthropic wealth transfer plans
- For families with growing trust networks, designing and implementing private trust companies, which provide robust, multigenerational governance structures, incentives to attract non-family experts as fiduciaries, and potential federal and state tax benefits
- In instances of family disputes, offering solutions to bridge gaps or, if necessary, joining the fight on behalf of one or more parties.

Our firm's leadership in the technology, life sciences, and investment fields informs our advice across disciplines, which benefits family office clients who built their wealth and/or seek to invest in those spaces.

Our services include:

- Family Investment Vehicles
- Family Office Regulatory & Compliance
- Private Equity and Venture Capital Investments
- Hedge Fund Investments
- Social Impact Investing
- Seed Stage & Angel Investing
- Intellectual Property
- Mergers & Acquisitions
- Joint Ventures
- Corporate Governance
- Business Divorce
- Tax
- Estate Planning
- Estate Administration
- Fiduciary Counseling
- Philanthropic Planning & Administration
- Employee Benefits & Executive Compensation
- Employment Counseling & Litigation

HONORS & AWARDS

> **Crain's: Notable Women in Law – New York (2021)**
Recognizing women lawyers who have impacted New York City through their distinguished careers and exceptional civic and philanthropic activities

> **Chambers High Net Worth Guide (2016-2021)**
#1 ranking for Trusts & Estates practice: Private Wealth Law