akerman

Practices

Family Office

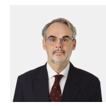
For families whose wealth spans borders, asset classes, operating businesses, and generations, legal counsel must do more than prepare documents. It must align tax, trusts and estates, investment and transaction structuring, corporate, real estate, executive and incentive compensation, philanthropy, art, yachts, aviation, and other personal assets, risk management, and business succession into a coordinated strategy designed to build, preserve, protect, and transfer wealth in an increasingly complex global environment.

Akerman’s Family Office Practice advises ultra-high-net-worth families, family offices, family-owned enterprises, fiduciaries, and closely held investment vehicles on sophisticated domestic and cross-border planning, structuring, governance, and dispute-resolution needs. We draw on capabilities across the firm, from tax and trusts and estates to corporate, real estate, litigation, and international matters, to provide integrated counsel through a single, relationship-driven point of contact.

Our approach is discreet, practical, and collaborative. We work closely with family principals, family office executives, trustees, accountants, investment managers, bankers, insurance advisors, and other trusted professionals to help families make informed decisions, anticipate risk, and implement structures that reflect their objectives, values, and legacy.

Single-Family and Multi-Family Offices

Connect With Us



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Our Team

Related Work

- Corporate
- Employee Benefits and Executive Compensation
- Equine Law
- Hospitality
- Immigration Strategic Planning and Compliance
- International
- Investment Funds
- M&A and Private Equity
- Probate and Fiduciary Litigation
- Real Estate
- Tax
- Tax-Exempt Organizations
- Trusts and Estates
- Venture Capital and Emerging Growth Companies

We advise both single-family and multi-family offices on the legal frameworks that support formation, governance, operations, investment activity, regulatory compliance, compensation arrangements, fiduciary obligations, and intergenerational transitions.

Coordinated Approach to Wealth Preservation and Growth

Family office planning requires legal advice that extends beyond any single discipline. Our lawyers provide strategic, long-term counsel that helps families preserve flexibility while managing risk and preparing for future generations.

Our team advises across the full life cycle of family wealth: from family office formation and operating structures to succession planning; from domestic trusts to multi-jurisdictional holding companies; from private foundation governance to art, yacht, aviation, real estate, and other special asset planning; and from investment activity to tax controversy and fiduciary disputes. We serve families with connections across the United States, Europe, the Middle East, Latin America, and Asia, providing holistic, responsive, and relationship-based counsel.

What We Do

- **Family office formation and governance**
  - Formation, restructuring, and operating models
  - Governance frameworks, policies, and decision-making protocols
  - Family office operations, fiduciary duties, and succession planning
- **Estate, trust, and wealth transfer planning**

    - Domestic and multi-jurisdictional trust structures
    - Estate, gift, and generation-skipping transfer tax planning
    - Inbound and outbound wealth transfer strategies
    - Pre-immigration and expatriation planning
- **Investment and transaction structuring**
    - Acquisitions and dispositions of controlling and non-controlling business interests
    - Private fund, co-investment, and holding company structures
    - Executive compensation and incentive structuring
- **Tax advisory, structuring, and controversy**
    - Tax-efficient domestic and cross-border structures
    - Tax reporting positions and compliance strategies
    - Federal, state, and local tax audits
    - Tax assessments, appeals, and litigation
- **Business succession and asset protection**
    - Family business succession and continuity planning
    - Asset protection and risk mitigation strategies
    - Prenuptial and postnuptial agreements
    - Fiduciary counsel, trust administration, and dispute resolution
- **Philanthropy and charitable planning**
    - Private foundation formation, governance, and compliance

  - Charitable trusts and donor-advised fund strategies
  - Tax-efficient charitable giving and legacy planning
  - Cross-border philanthropic planning
- **Art, yacht, aviation, and special assets**
  - Collection planning, management, and succession
  - Art-related tax planning and charitable gifts
  - Yacht, aviation, and other special asset acquisition, operation, and disposition
- **Equine law**
  - Equine sales and leasing agreements
  - Equestrian facility real estate transactions
  - Boarding and training contracts
- **Commercial and personal real estate**
  - Commercial real estate acquisition, ownership, financing, leasing, operation, restructuring, and disposition
  - Single assets, portfolios, family-use properties, development projects, joint ventures, and co-investments
  - Holding vehicles and tax- and succession-sensitive ownership structures
  - Personal real estate acquisition, disposition, and pied-à-terre tax advisory
  - Land use and zoning