

Case study: Families



The scenario; a four generation family, with circa 20 members, an age range of over 90 years and homes in five countries.

Affinity's role; we are trustee to three settlements and wealth managers to the overall family. This requires us to;

- understand their needs and the personalities involved
- help them find a common set of values
- translate these into a cohesive strategy

We apply this against a backdrop of complex tax rules.

The knowledge gained, enables us to manage their investment portfolios, on an advisory and discretionary basis, within the trusts and in their own names. The family own a range of assets from fine wine and property, to mainstream and illiquid investments, including private equity.

The family receive customised analysis and reporting - liberating them from the responsibilities of financial management, which would otherwise fall on them.

We counsel on the transition of wealth, acknowledging that the priorities of millenials will differ to earlier generations.

Our priority is to safeguard their long-term interests.