

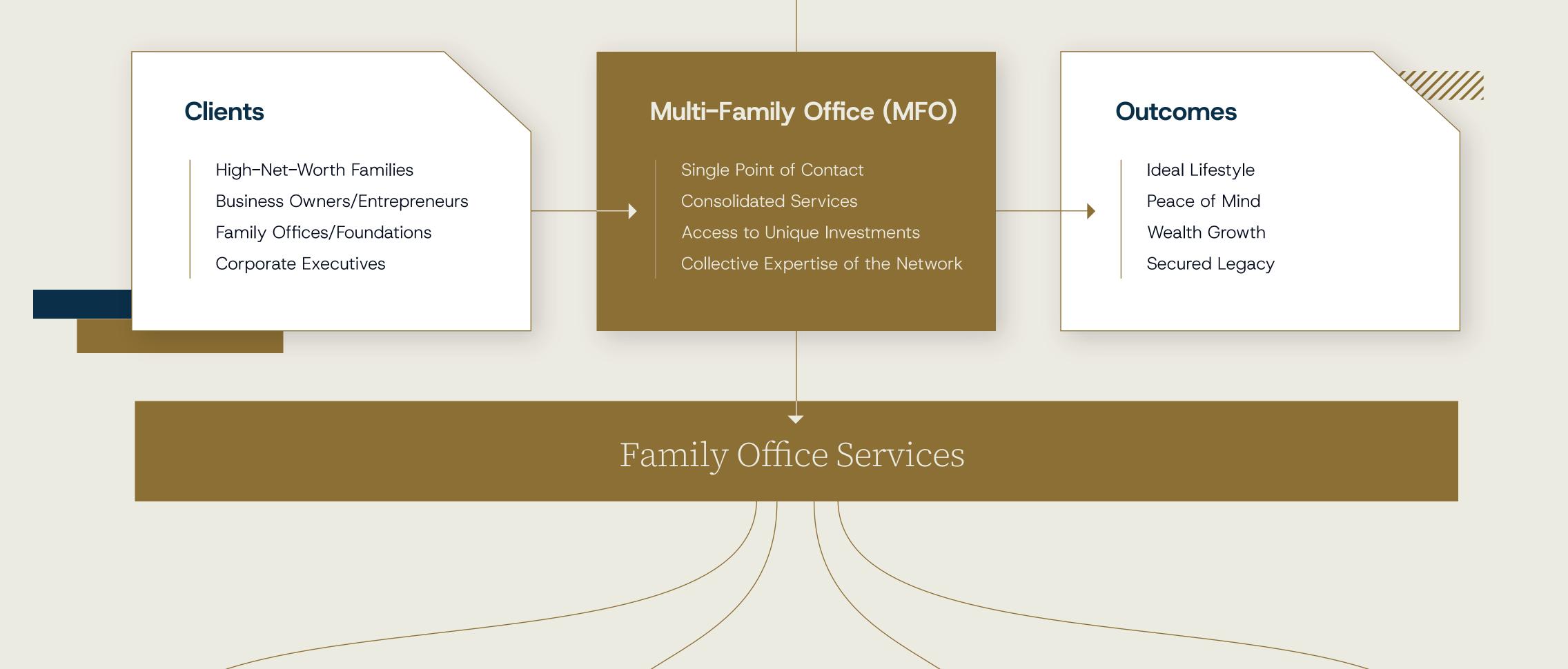
# What Is a *Multi-Family Office?*

The business of building trust and securing legacies for high-net-worth families.

A multi-family office, or MFO, provides a diverse suite of consolidated services to simplify the lives of high-net-worth families and help them secure their legacies for generations.

While a single-family office can be cost-prohibitive and outsourcing to individual vendors is inefficient and laborious, a multi-family office provides families with a single point of contact for everything from investment management and reporting to next-generation education and bespoke concierge services.

### How does an MFO operate?



#### **Integrated Planning**

Estate Planning & Trust Services Tax, Insurance & Philanthropy Advisory Private Banking

#### **Operating Business**

Capital Markets Access Transaction Readiness Strategic Partner Introductions

#### **Investment Management**

Portfolio Construction Cash Flow Planning Consolidated Reporting Investment Sourcing & Due Diligence

### Lifestyle Management

Bespoke Lifestyle Services Household Management & Administration Next-Generation Education

## What are the *benefits* of an MFO?

The valuable differences of an MFO are many, but these are among the most transformative:



Access to Comprehensive Services & Expertise



Total **Client Alignment** 



Synergy of the Family Network



More **Client Engagement** 

By working with multiple families, an MFO provides a full, experienced family office team, leading-edge tools, and premium bespoke services at a more cost-effective price point.

Operating as a single partner to high-net-worth families, an MFO is able to take a comprehensive view and integrate all areas of advisory and strategy.

With thoughtful client selection, an MFO creates a family-to-family network which benefits from shared experiences and solutions.

An MFO can provide extremely high-touch services due to a much lower client-to-advisor ratio than traditional brokerages or wealth management firms.



Reach out to Legacy Knight today to start the conversation.

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