



# Who needs Family Office?



Geneva, March 2011





## Why One Needs Family Office?

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*«From shirt sleeves to shirt sleeves in three generations»*

Family office can help to disprove  
the statement above



# Why Family Office?

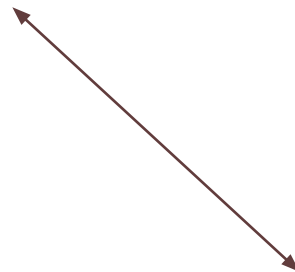
*Russia*



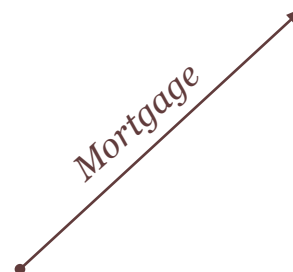
Client



Personal  
Real Estate

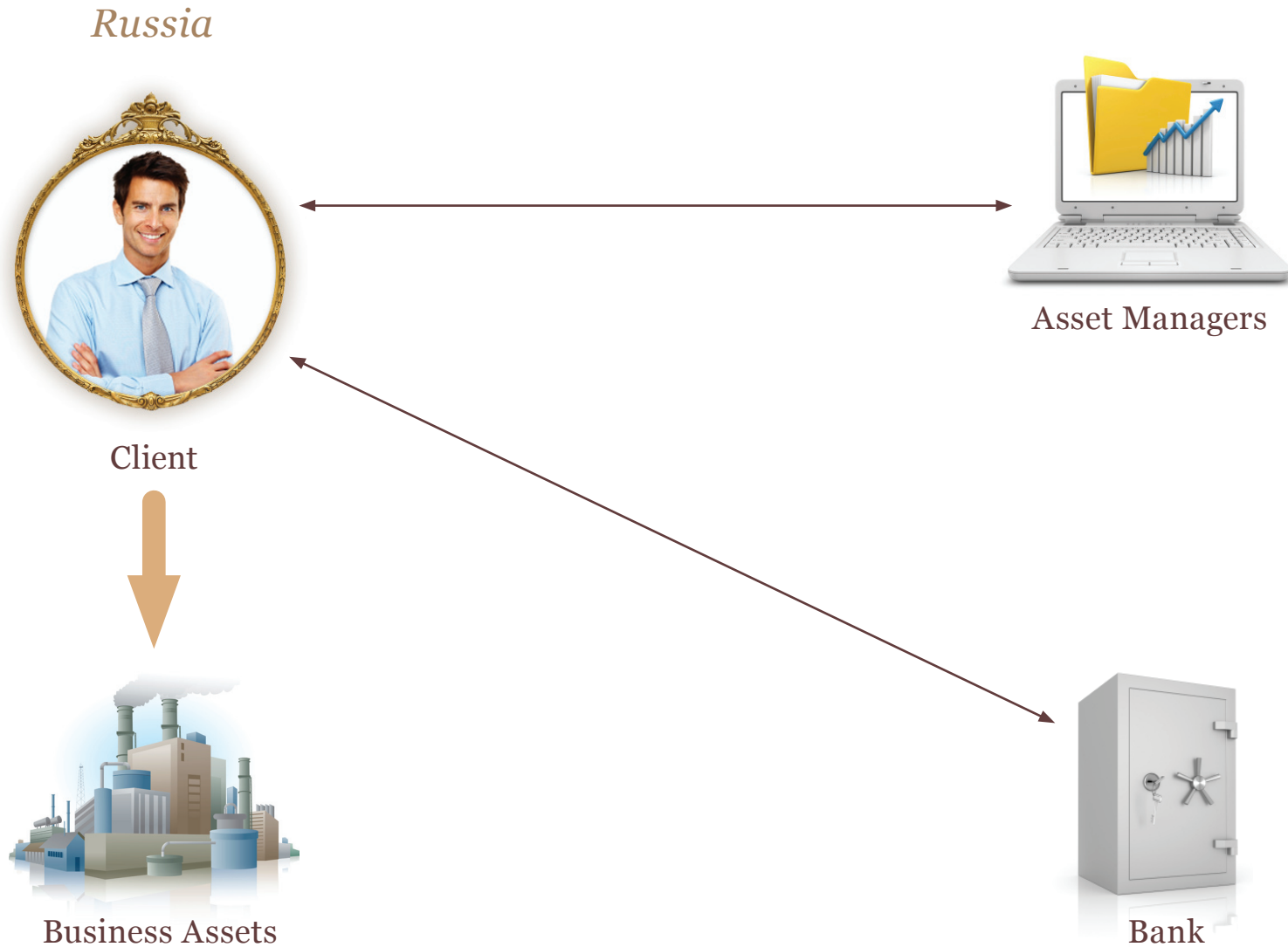


Bank



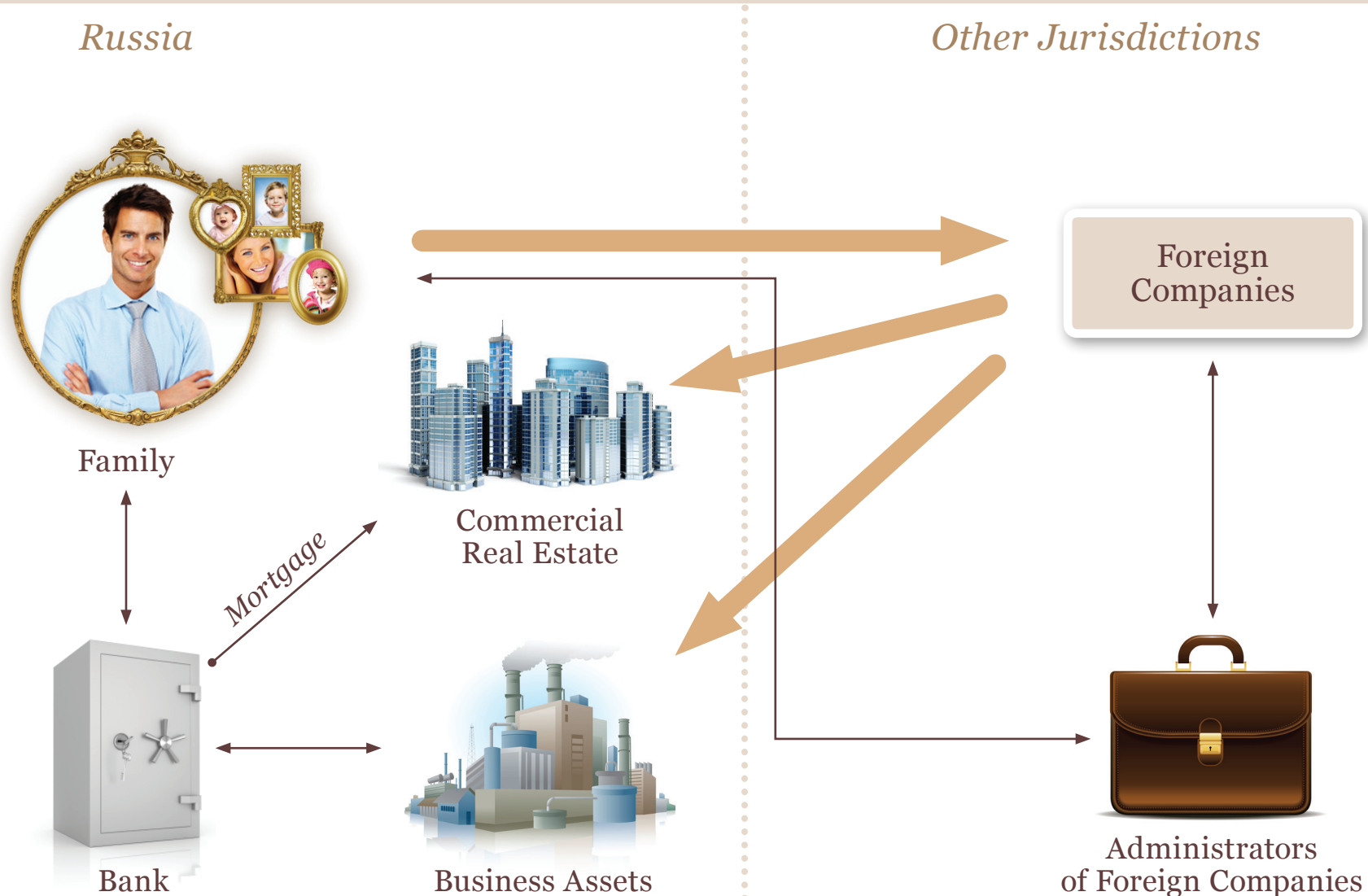


# Why Family Office?



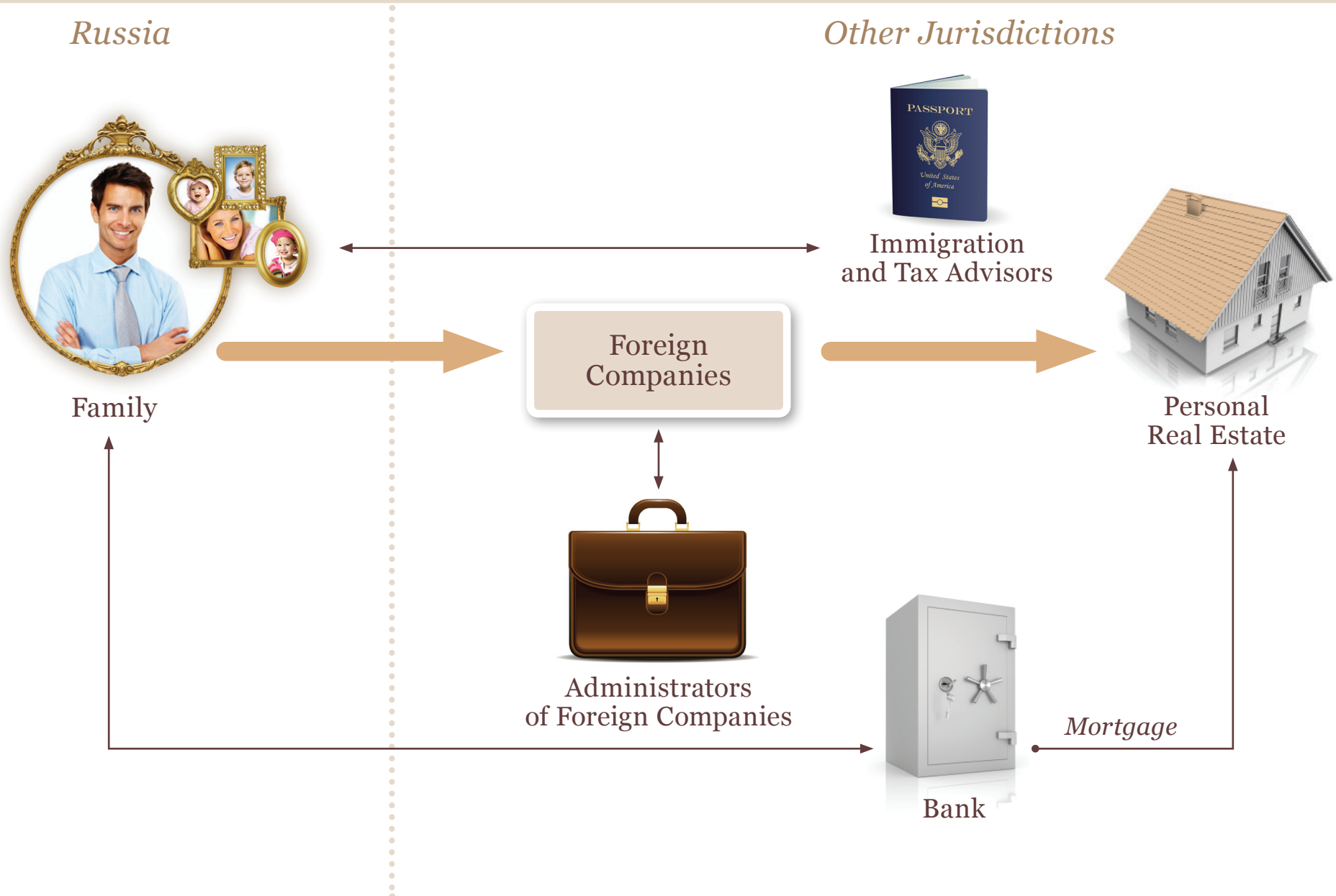


# Why Family Office?



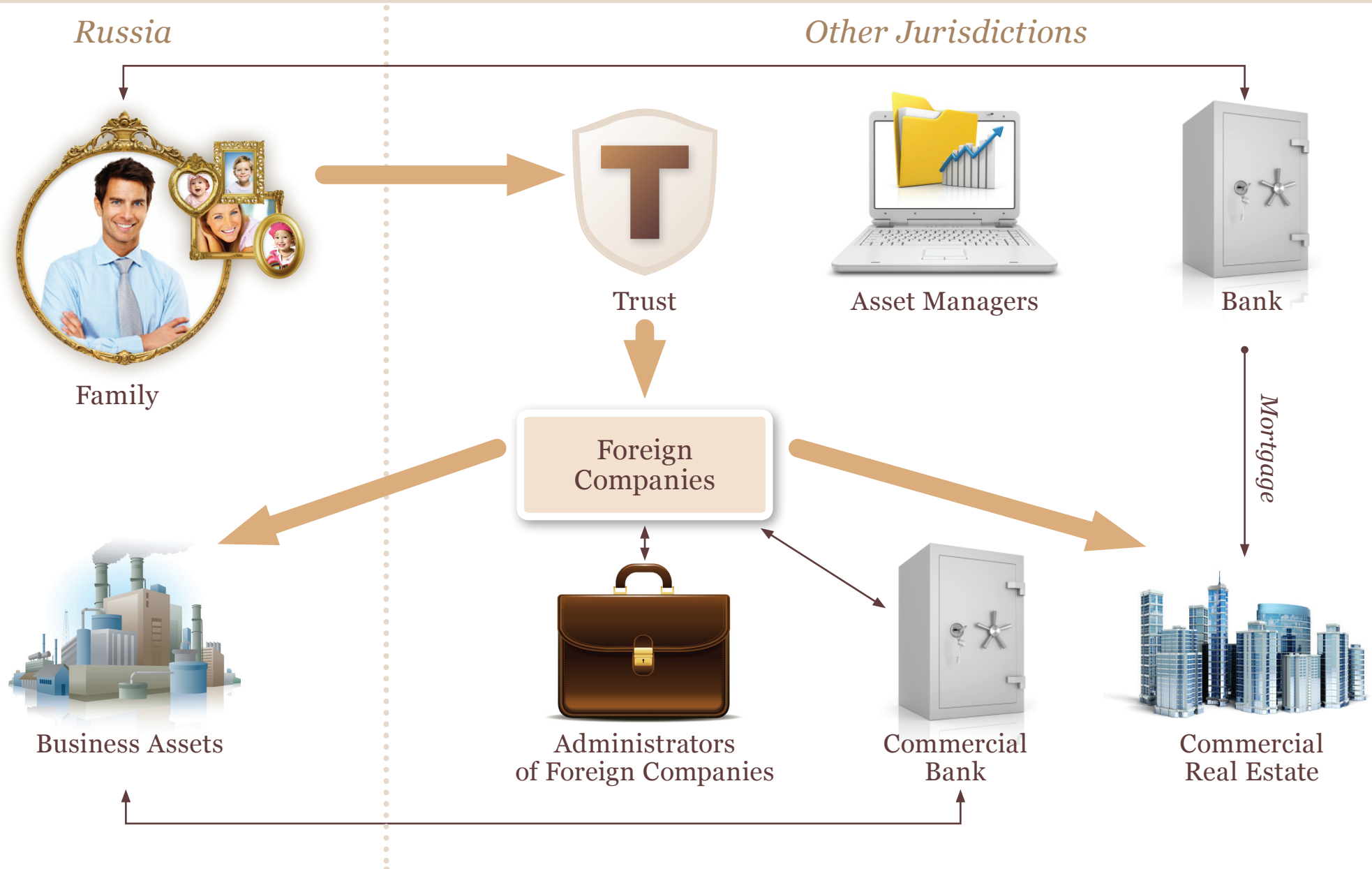


# Why Family Office?



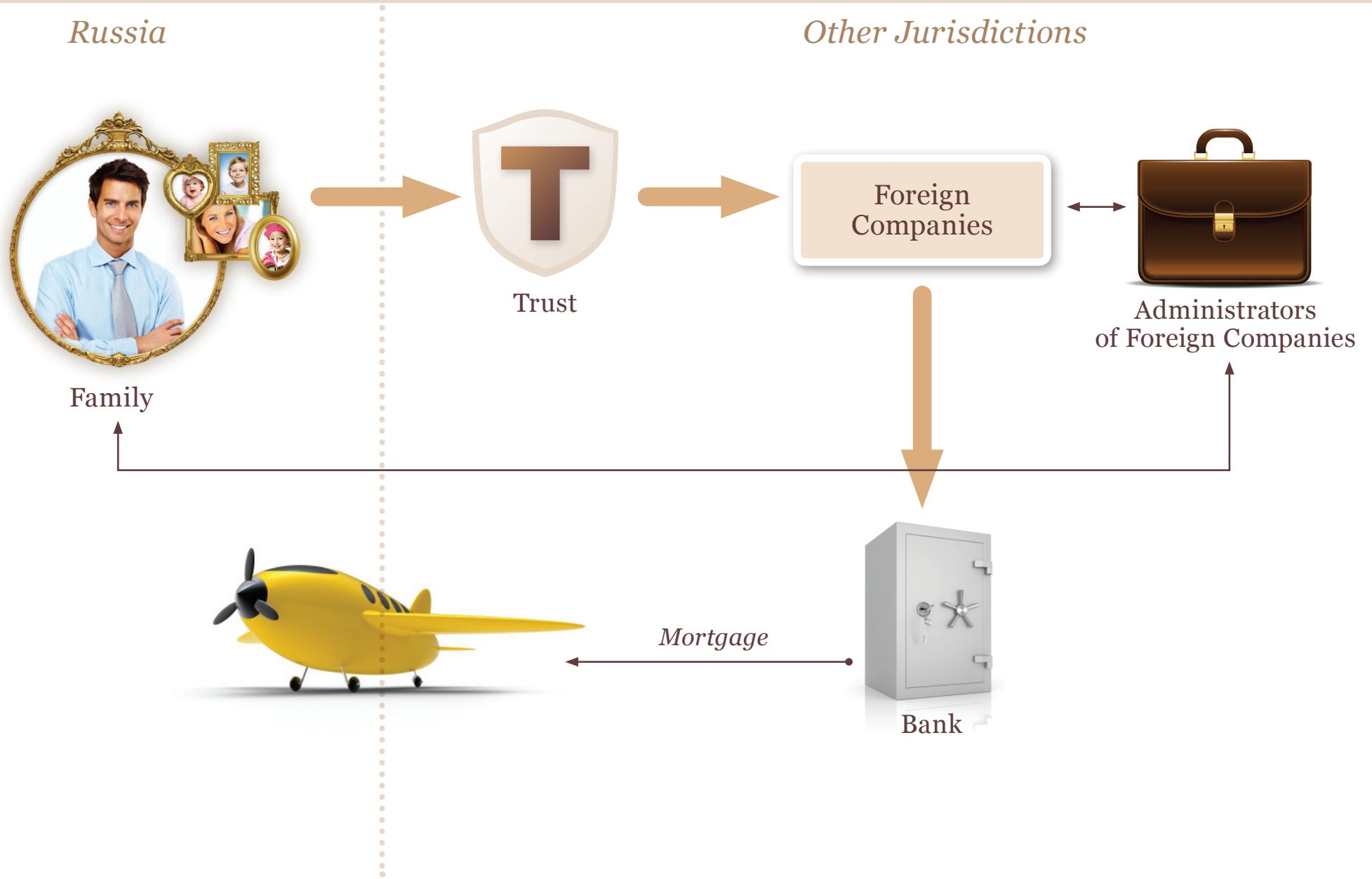


# Why Family Office?





# Why Family Office?







## Why Family Office?

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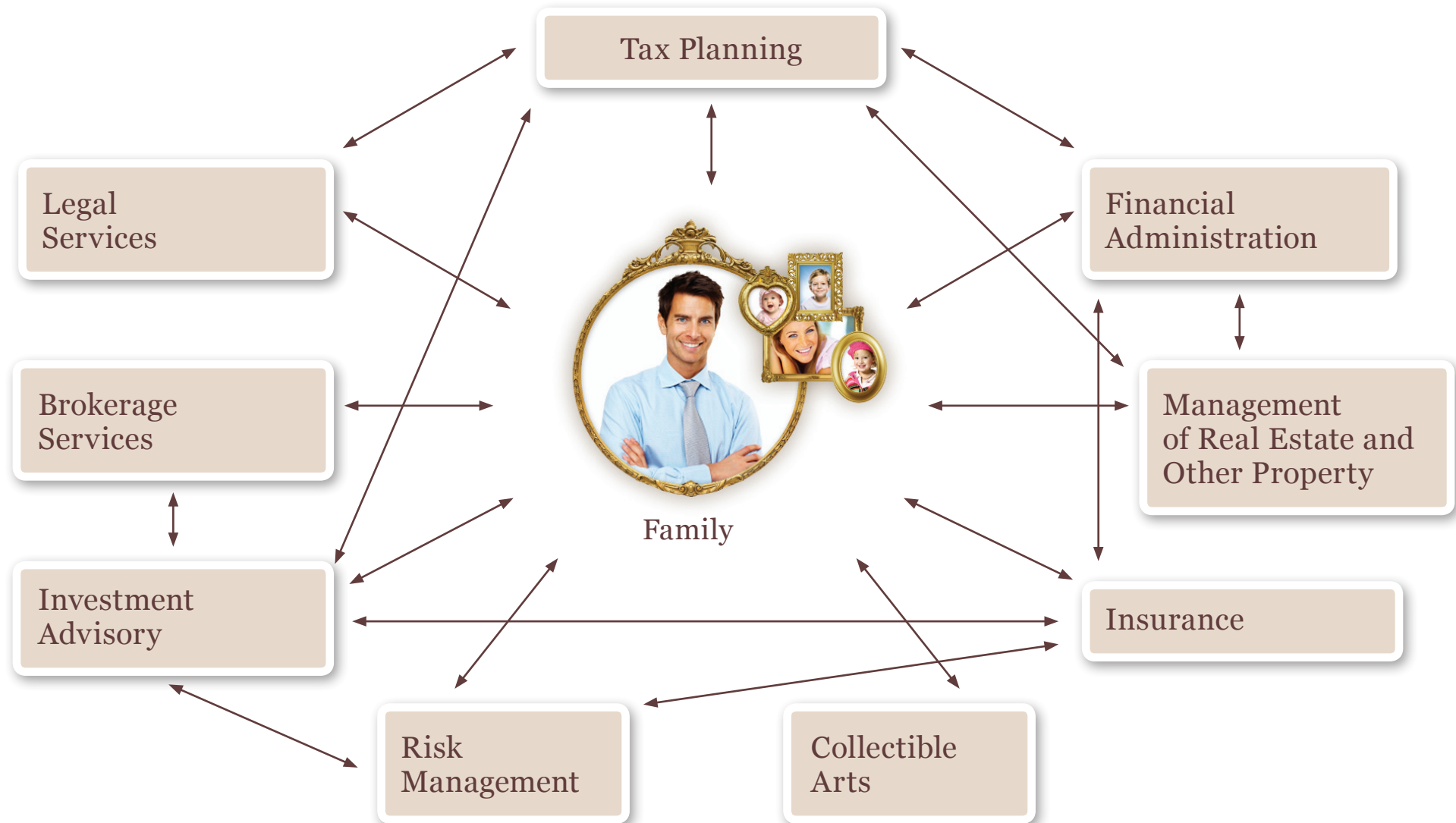
Family



Family Office

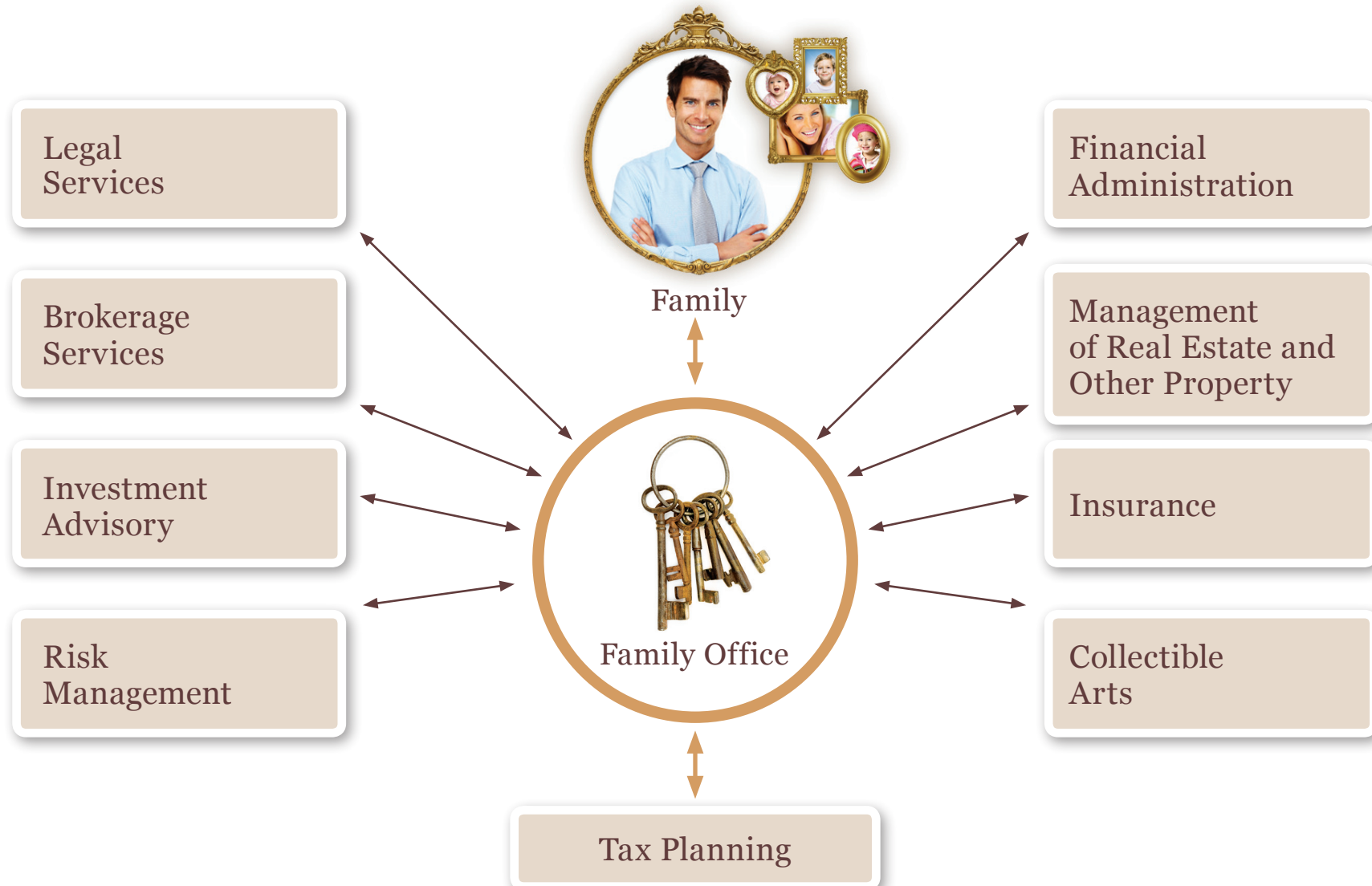


## Typical Situation





# How Family Office Works





## Family Office Value for Banks

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- Strengthens client loyalty;
- Provides optimal solutions for clients;
- Minimizes negative consequences of bad decisions.





## Services We Provide

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### Structured Assets and Capital

- Create and optimize holding structures for diverse family assets;
- Delineate and separate personal assets from client's business assets;
- Organize risk management and insurance to safeguard property;



## Services We Provide

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### Investment consulting and financial administration

- Formulate a comprehensive, long-term investment strategy tailored to the needs of the family;
- Propose the broadest possible range of investment opportunities, achieving an optimal balance between risk and reward;
- Monitor the effectiveness of investments on an on-going basis;



## Services We Provide

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### Investment consulting and financial administration

- Consolidation, monitoring, and accounting of all cross-border cash flows;
- Tailored tax planning and reporting, on behalf of the family, including filing for all appropriate countries and jurisdictions;
- Cash flow and expenditure projections, monitoring, and control.



## Services We Provide

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### Succession planning and additional services

- Creation of an overall capital ownership strategy for the family;
- Tailoring appropriate legal structures to ensure the smooth hereditary transfer of assets while minimizing expenses;
- Ensuring confidentiality about the distribution of wealth within your family;





## Services We Provide

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### Succession planning and additional services

- Assist in the acquisition, sale, lease, and management of property in Russia and throughout the world;
- Select educational institutions, language training, and study programs;
- Render emergency legal assistance to family members.



## UFG Wealth Management structure

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UFG Wealth Management has three departments:

- FINANCIAL
- LEGAL
- INVESTMENT



## UFG Wealth Management structure

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Close cooperation between departments helps to provide tailored services to each client and to implement family's wealth management strategies in the best way.



UFG Wealth Management

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# You Reliable Partner

*Please contact*

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