CAVENDISH
FAMILY OFFICE

PROTECTING AND GUIDING FAMILY WEALTH

Who we Help

We work with international families with net worth between £5m – £100m who require structure, clarity and long-term stewardship of their wealth.

We establish and coordinate bespoke Family Office structures designed to serve multiple generations. Our role is to provide governance, oversight and strategic direction, ensuring your family's wealth is organised, protected and aligned with its long-term values.

Specific Services

SUCCESSION PLANNING	LEGAL ADVICE	INVESTMENT OVERSIGHT & COORDINATION
GOVERNANCE ARCHITECTURE	TAX ADVICE	COMPLIANCE

HOW WE HELP

ALIGNMENT

The complexity of managing family wealth can obscure what truly matters: unity, clarity and long-term purpose. Immediate financial decisions are obvious, while the bigger picture of your family's shared vision becomes blurred. Differences in perspective between generations or advisors can add further strain.

We help families create structure, alignment and direction. By establishing a formal roadmap and framework, we ensure your family remains united in purpose and never loses sight of where it is heading.

STRATEGY

It can be challenging for a family to articulate its long-term goals. Different generations can have different intentions and aspirations. This is especially true during periods of transition such as a liquidity event, inheritance or structural change.

We work to bring those disparate aims together under a unified vision. The Family Office model provides this cohesion when it comes to any number of critical issues, including business exit planning and value acceleration considerations.

www.cavfo.com
Cavendish Family Office (London) Ltd Registered in England No. 11213617
1st Floor, 3 Sharrow Lane, Sheffield, S11 8AE

CAVENDISH
FAMILY OFFICE

ALIGNING ASSETS WITH ASPIRATIONS

True alignment occurs when a family's financial architecture reflects its deeper aspirations, values and long-term vision.

As part of our bespoke process, we begin by exploring both sides of the equation:
your tangible assets and your intangible ambitions. By placing aspirations alongside assets from the outset, we design a Family Office structure that integrates personal, familial and financial objectives within one coherent framework.

Where desired, we may introduce a specialist mindset coach to support you and your family in exploring and articulating your aspirations.

FRESH PERSPECTIVES

Families are close-knit groups. Sadly, this also increases the possibility of "group think" and an insular approach to high-stakes decision making. By offering our independent insight, we make sure that you are speaking to the right experts at the right time.

When you solicit the best possible advice you will significantly mitigate the risk of serious error. Similarly, regular exposure to new ideas—and lending an ear to those in your family who might speak up less often—will ensure that you remain flexible and open to innovation and opportunity.

ALLOWING FOCUS

Managing the financial legacy of an entire family is onerous. Keeping on top of and coordinating all the different investment managers, tax information and estate planning should not fall to one individual or generation.

By implementing a Family Office model and outsourcing to specialist advisers, we relieve your family of this burden, allowing you to regain some of your flexibility and focus on your business, personal ambitions and relationships.

CASE STUDY

CLIENT

A family preparing for a major liquidity event.

PROBLEM

An entrepreneur in his 50s wanted his family (wife and two children) to be fully involved in the management of their forthcoming wealth so that, in time, they could become fully fledged future custodians of the family wealth.

SOLUTION

Our job was to provide the family with time, education, counselling, and the co-ordination of all the strategic partners including legal, tax, and structuring.

We started by developing a Family Constitution to clarify shared values, governance processes and decision-making protocols. This led to the establishment of a Family Investment Company, managed by a discretionary manager, to invest the money for the very long term.

We continue to meet regularly as a group to discuss both the performance and longer-term family issues, such as legacy, tax planning and the progress of the children as future leaders.

CONTACT US

Via Phone: + 44 7973 634 185
Via Email: mark@cavfo.com

www.cavfo.com
Cavendish Family Office (London) Ltd Registered in England No. 11213617
1st Floor, 3 Sharrow Lane, Sheffield, S11 8AE