

advinda SalesStudio^{PRO}

New Release - September 2021

DEFINITIONS OF THE WEALTH COMMUNITY IN
ADVINDA INVESTOR CLOUD

SINGLE FAMILY WEALTH/ENTREPRENEURIAL WEALTH

PRIVATELY-OWNED BUSINESS AND/OR INVESTMENT COMPANY

The family has a controlling ownership interest in the business and is generally actively involved in the day-to-day management of the business.

In the case of the family-owned investment company, it often has a strong investment focus on either **private equity, venture capital, public equities, or real estate.**

PE

VC

EQ

RE

In addition to that, we list here also the Family foundations: Entities that exist to support and oversee the charitable activities of a family. Funded by donations from a family. The foundation will invest the money given to it to make a return as well as to fund charitable projects and philanthropic activities.

MULTI FAMILY WEALTH/ENTREPRENEURIAL WEALTH

PRIVATELY-OWNED BUSINESS AND/OR INVESTMENT COMPANY

Owned by a couple of families, mostly than the wider family and friends circle.

The families have a controlling ownership interest in the business and are generally actively involved in the day-to-day management of the business.

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DEFINITIONS OF THE WEALTH COMMUNITY IN
ADVINDA INVESTOR CLOUD

SINGLE FAMILY OFFICE (SFO)

FORMAL PRIVATE OFFICE FOR A FAMILY OF SIGNIFICANT WEALTH

The purpose of the office can vary but is dedicated exclusively to serving the investment, personal and legacy needs of one family.

MULTI FAMILY OFFICE (MFO)

**FORMAL PRIVATE OFFICE FOR MULTIPLE FAMILIES
OF SIGNIFICANT WEALTH**

This field grows exceptionally, esp. in the APAC regions.

In some instances, SFO's have opened their doors to other families and now manage or oversee the investment affairs of three, four, or more families.

The majority of their MFO services for the family are investment management, asset management, governance, reporting, philanthropy and concierge.

CAPTIVE FAMILY OFFICES WITHIN PRIVATE BANKS

The primary objective of a Captive Family Office of a mostly private or investment bank is to manage clients' real and financial assets across traditional and alternative asset classes, with a vision to realising their investment objectives.

FOUNDATION AND PHILANTHROPY

Wealthy families increasingly are considering family offices to manage their philanthropic giving.

Managing philanthropy through the family office can be a very effective approach for families, particularly if there are multiple branches to the family and if they are using a number of charitable vehicles.

FAMILY OFFICES WITH ASSET MANAGEMENT CAPABILITIES

There are multi-family offices in Europe which have emerged from asset management. The focus on a particularly wealthy clientele has always been attractive. Hence more and more asset managers seem to be focusing on very wealthy families and private individuals.