Family Office Schematic

New Operating Company(s)

Captive Insurance, LLC (TBD)

Real Estate Holding, LLC

- Property 1
- Property 2

- Marketable Securities
- Private Equities
- Other Assets

Management Company, LLC

Manager(s)

Holding Company, LLC

- Centralized ownership
- Asset protection via charging order
- Isolate highly appreciating assets
- Maximize estate transition

- Centralized management
- Separate ownership from control
- Provides formality to family business structure
- Facilitate business succession

Living Trust

Dynasty Trust

Family Foundation