

Insurance Services

- Insurance portfolio evaluation and implementing new insurance policies
- Renegotiating and amending existing policies
- Support with private placement life insurance as a wealth planning tool
- Organizing international health insurance
- Support with universal life insurance (ULI) as an estate planning tool
- International personal liability insurance
- Insurance related to special assets, e.g., aircraft, yachts, art and the like

Estate Planning Services

- Support with estate planning
- Support with drafting testaments/last wills
- Retirement planning
- Executorships

Budget & Cash Flow Management Services

- Assessing actual wealth and current income, diagnosis of short- and medium-term liquidity requirements and long-term goals
- Cash-flow projections
- Private accounting
- Cash management (bill paying, cash flow, budgeting, etc.)

Administrative Services

- Support with general legal issues
- Document & record management
- Accounting
- Bookkeeping
- Collection and filing of your administrative documents
- Payment of invoices and taxes, and arranging tax compliance

CONTACT US

www.globoconsulting.com

AMERICAS (HQ)

Santiago Goiri, TEP
T: +507 6284 7331
E: panama@globoconsulting.com
Physical: 50th Street, F&F Tower,
Floor 31, Suite 31A,
Panama City, Republic of Panama.

Luis Miguel Ghinaglia
T: +1 305 3997252
E: l.ghinaglia@globoconsulting.com
Physical: Oaks Terrace, Pompano Beach
Miami, United States of America

MIDDLE EAST

Mimoun Assraoui
T: +971 4319 7680
E: dubai@globoconsulting.com
Physical: Level 41, Emirates Towers
Sheikh Zayed Road,
Dubai, United Arab Emirates P.O Box 31303

ASIA PACIFIC

Edward Ym
E: hongkong@globoconsulting.com
Physical: Office 501, Eastern Commercial Center
397 Hennessy Road, Wan Chai, Hong Kong



Multi-Family Office
www.globoconsulting.com

GLOBO CONSULTING MULTI-FAMILY OFFICE

Our Globo Consulting multi-family office is a private-own company that supports wealthy families with the management, organization and maintenance of their wealth.

How does Globo Consulting multi-family office support you?

Globo Consulting multi-family office offers services such as wealth planning, administration, asset management, asset consolidation, asset performance monitoring, charity services, tax and legal services, trusteeship and risk management. We can also provide insurance solutions, help in investments in private equity or manage real estate. Other services may be provided according to personal family needs.

Why Globo Consulting Multi-Family Office?

The main reason for families to engage our services is control. Globo Consulting family office is used to manage your wealth once it becomes too complex to be managed by yourself, when it takes up too much time or you just do not have the capacity and/or knowledge to manage it yourself, or when several generations are involved.

Globo Consulting multi-family office will be your single point of contact (One Time Stop Shop), will support you with a broad range of issues and will represent the family in numerous situations in the outside world.

The multiple roles of a family office

In Globo Consulting multi-family,

- We deal with the private banks and professional advisors of the families
- We consolidate all relevant financial information in one report
- We coordinate with banks and establish an overall investment strategy (or asset allocation)
- We act as a connection between family members and as a coach for younger generations
- We support the family with all its wealth planning needs we have access to a large external network of specialists and can draw on the experience it has gained in serving other wealthy families

Globo Consulting Multi Family Office Services

Wealth Management / Investment Services

- Diagnosis of your overall financial situation
- Defining the family's investment objectives
- Establishing risk profile and investment horizon
- Global asset allocation and investment strategy
- Evaluating non-registered securities
- Administering and advising on banking relationships
- Opening private bank accounts on behalf of the family
- Discretionary and non-discretionary mandates

Monitoring and Reporting Services

- Consolidated reporting of global bank accounts
- Consolidation and reporting of all family assets (including non-bankable assets)
- Consolidated performance reporting
- Risk adjusted performance reporting and risk attribution
- Benchmark comparison
- Fiscal annual performance
- Risk reporting
- Offering an online reporting system

Family Governance Services

- Support in putting family governance into place
- Arrangements for succession within the company
- Support with legacy protection
- Set-up of family constitution
- Organizing family retreats and family assemblies
- Supporting family council meetings
- Mentoring family members
- Individual education according to family members needs

Wealth Planning Services

- Structuring assets and investments to aid tax planning
- Advice on ownership, management and distribution of assets
- Privacy and wealth protection structures

Taxes / International Tax Planning Services

- Double-tax treaty planning for family-owned companies and real estate
- Local and international tax advice
- Fiscal company migration
- Preparation of tax returns (including country of residence)

Trustee and Corporate Services

- Advice on issues of company incorporation and management in various jurisdictions
- Managing family shareholdings
- Selecting appropriate jurisdictions for trusts, foundations and other (corporate) structures
- Setting up, administering and coordinating trusts, foundations and other (corporate) structures
- Coordinating contacts with various local and foreign authorities
- Selecting independent trustees and protectors
- Controlling costs of external trust providers
- Providing registered office facilities
- Providing nominee services

Charity & Philanthropy Services

- Philanthropic planning
- Assistance and guidance in the establishment and administration of charitable foundations
- Support in formulating a donor's giving strategy
- Technical advice on and operational management of charities
- Establishing grant-making foundations and trusts
- Preparing and presenting philanthropic initiatives
- Organizing fund-raisers

International Relocation Services

- Analyzing tax and other benefits of international relocation
- Support with change of domicile
- Support with obtaining international residence permits
- Assistance in locating and applying to foreign schools
- Coordinating contacts with all involved authorities (federal, cantonal and municipal)

Real Estate Services

- Real estate advisory
- Bespoke property search
- Access to off-market luxury properties
- Creating a property portfolio
- Administrative property acquisition support
- Support with sale of real estate
- Real estate management
- Organizing security protection of private residences
- Real estate financing/mortgages

Aircraft, Yachts, Art, Horses, etc.

- Support with acquisition and sale of yachts, aircraft, (classic) cars, horses, art pieces and other valuables (Passion investments)
- Refinancing aircraft, yachts and reviewing existing arrangements
- Setting up tax-efficient structures for yachts, aircraft, art and the like
- Providing digital images and condition reports of artwork in an online system
- Recording insurance details of assets
- Organizing restoration and storage of art

Business Development / Investment Banking / Private Equity

- Merger & Acquisition advisory
- Support with Initial Public Offerings (IPO)
- Structured finance
- Partner matching
- Support with raising equity finance
- Private equity investments and structures

