

Family Office

A Family Office is as unique as the family it serves, with priorities that reflect the values, goals and vision of its founders.

At Polsinelli, we understand that effective Family Office representation requires a tailored, comprehensive and multidisciplinary approach. Whether the focus is on wealth preservation, investment strategy or philanthropy, we align our work with these priorities. Our team has decades of experience advising families and unique Family Office structures and recognizes that discretion and sensitivity are vitally important.

Our Family Office practice works seamlessly— both within our firm and with outside advisors — to provide holistic and strategic counsel that addresses every facet of Family Office management, operations and initiatives.

Tailored Representation

Our work for Family Offices regularly includes:

- Structuring and administering both single- and multi-Family Offices
- Succession planning and governance to promote long-term harmony and stability
- Estate planning, wealth preservation and wealth transfer strategies
- Transactional representation and asset management, including mergers and acquisitions, real estate, venture capital, limited partnerships and other investments, data privacy and intellectual property, among others
- Tax planning and investment strategy coordination
- Regulatory compliance
- Philanthropic planning, including gifting strategies and charitable structuring

By leveraging our firm experience across our Investment Management & Funds, Tax and Trusts & Estates practices, we ensure that all aspects of our clients' investment strategies are aligned while satisfying complex legal and regulatory requirements.

Long-Term Guidance, Generational Stability

We work across generations to ensure that the “business of family” is thoughtfully integrated into our approach and counsel. Our goal is to safeguard not just financial assets, but also the values, governance structures and accountability measures that sustain wealth and legacy over time.

At Polsinelli, we pride ourselves on discretion, excellence and trust. Our deep experience as investors, board members and in-house counsel allows us to offer superior service while building meaningful and lasting relationships with our clients. We are honored to represent successful families across the United States and to serve as a trusted partner through generations, ensuring continuity, stability and long-term success.