NEAL
GERBER
EISENBERG

Investment Review and Structuring

Our dual representation of fund managers and investors gives us unique insights into structuring family office investments to protect and transfer wealth and businesses to future generations. Our advice addresses social impact considerations and the philanthropic legacies of preceding generations. We review investment vehicles and strategies, educate family members to be responsible investors, work to manage risk and implement tax-efficient succession plans for intergenerational wealth management.

We focus on custom solutions based on liquidity, cash flow, tax, risk and return requirements, including the investment services family offices may offer their members. Our counsel covers investment management and financial reporting, legal, regulatory, and reporting compliance issues. We analyze fund, private equity, new business ventures, real estate holdings and other traditional and non-traditional asset investments, advise on due diligence and market terms and practices, negotiate managed accounts, and handle securities law compliance.

KEY CONTACT

Lawrence I. Richman
Investment Review and Structuring

lrichman@nge.com
D. (312) 269-8070

RELATED CLIENT SERVICES

Estate Planning
Business Structuring, Succession Planning & Tax Matters
Family Office Services
Charitable Planning
Probate, Trust & Estate Administration
Trust & Estate Disputes