



# **FAMILY OFFICE SERVICES**

Reliable Information You Can Take Decisions On.

# Family Office Services

## For Entrepreneurs

Our company has a 60 year legacy in wealth planning services to families and administrative support to sophisticated investors.

We have created SGG Family Office Services to empower families with expertise and tools which allow them to have a clear view of their entire wealth management and risks.

Our mission statement is to **provide reliable information you can take decisions on.**



### How Do We Do It?

Our approach features a complete "Wealth Check" taking all assets and liabilities of the entire family into consideration: liquid, illiquid, and even emotional investments.

Once this information is fed into our system, we generate a fully consolidated asset and liability report.

This report gives you visibility and control over your assets and liabilities, tax, risk, cash management, cost, and compliance monitoring.

## "And One More Thing..."

What makes us truly unique is that our team of experts will also be by your side in your next private equity and real estate investment and will support you through the various challenges that all families face over time.



### A Complete Set Of Services

Our comprehensive approach will ensure that your wealth is preserved for the use and enjoyment of future generations.

We aim to be your central point of contact to which you and your family can turn at any moment for any demands related to your estate:

#### Information consolidation

- > Family wealth inventory and wealth check
- > Fully customized consolidated asset reporting
- > Data and document management

#### Family and corporate governance

- > Family charters with decision-making procedures, values and objectives
- > Corporate health check

#### Wealth planning

- > Succession, estate and next generation planning
- > Tax services: personal and corporate tax
- > Art and philanthropy

#### Risk management

- > Portfolio risk and exposure analysis
- > Cash planning and compliance monitoring
- > Asset and liability management

#### Private equity and real estate support

- > Supporting clients in corporate finance transactions: valuations, due diligence, acquisitions, sales, investments, etc.
- > Private equity and real estate investment monitoring
- > Assistance in purchase or sale of businesses related to family affairs
- > Private equity and real estate club deal introduction platform

#### Additional services can be provided:

- > Corporate administration services
- > 3<sup>rd</sup> party management company services
- > Depositary services
- > Payroll, part-time employees, offices
- > Regulatory & compliance services: FATCA, CRS, KYC, BEPS, etc.



## Technology And Accessibility

We have invested in some of the most advanced software solutions providing highly secured, easy to use wealth, reporting and document management tools which are also available on tablets and smartphones.



## A Global Solution

Your full satisfaction will always be our first priority. We trust that through our comprehensive network, we will always be able to connect you to the best advisors and experts who will be best suited to implement the solutions you have chosen.



# LEADERSHIP

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## AS OUR DNA

# 95,83%

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## CLIENTS SATISFIED OR MORE

## TIER 1

Depth and Range of Fund Services in Luxembourg  
Business Center Services in Luxembourg  
Securitization Services in the Netherlands  
Family Office Services  
Servicing Real Estate and Private Equity clients  
Servicing North-American and European clients  
Servicing State-Owned sector clients and Sovereign Wealth Funds  
India, MENA, Russia/CIS and Latin American markets

### **SGG Group delivers value for money.**

We pride ourselves on the expertise and responsiveness we bring to our clients, providing tailored, global solutions in a transparent and cost-efficient manner.

We specialize in servicing state-owned, sovereign wealth, real estate, private equity, infrastructure, debt and other traditional and alternative investment structures, as well as providing solutions for corporate and private clients.

## HIGHEST

Responsiveness  
Client Retention

We offer the fullest range of services encompassing the requirements of corporate administration services, consolidation and global accounting, fund administration, depositary and custody services, 3<sup>rd</sup> party AIFM services, and family office support.

## LOWEST

Staff Turnover

We provide global solutions and local expertise to our clients.

**We make business simple for you.  
We support your ambitions.**

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### Key Contacts



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