



Matheson

Private Wealth

Dublin Cork London New York Palo Alto San Francisco

www.matheson.com

PRIVATE WEALTH

Our Private Wealth offering provides a strategic, consultative and co-ordinated offering to its clients, including families, business owners and other creators of wealth. We work alongside investment managers and other professional advisers, including fiduciaries and family offices, in Ireland and abroad, to provide cohesive, multi-jurisdictional advice.

We advise domestic private clients and families to ensure that their international interests are aligned with their Irish legal and tax position. We live in a global world and integrated advice is a key aspect of what they do. We also have a growing base of international clients with Irish connectivity; be it through Irish resident family members or the holding of Irish situs assets.



FAMILY OFFICE

We provide ongoing support to a number of international and domestic family offices to co-ordinate Irish issues for their families. This may include acting as an intermediary in liaising with bankers, Irish investment managers, relators, and other third party service providers, to ensure that the financial and lifestyle needs of these families are met, while at the same time, ensuring their overall affairs are integrated.

Our Private Client team co-ordinate governance and philanthropic workshops for these families, so that the family can make business decisions which are better aligned with their common objectives and values.

When issues arise for these families, whether they relate to safeguarding assets, buying or selling business interests, setting up investment structures, the reputation of family members, or intra-family relationships, our team have the necessary expertise to provide an integrated approach to these issues.



As part of our Private Wealth offering, the team:

- advise domestic Irish families on family governance issues, including the implementation of family charters, as part of a broader succession plan;
- advise international clients and their families, with complex structured and personally held wealth, on tax planning on entry to and exiting Ireland;
- help clients maintain efficient and effective international structures to hold and manage their global wealth and provide a mechanism for post-lifetime planning;
- work with an established network of contacts across the world to co-ordinate seamless international estate plans for Irish resident individuals, who have legal and tax requirements outside of Ireland;
- act as lead counsel for Irish families in co-ordinating wider legal projects (other than estate planning) outside of Ireland;
- provide ongoing assistance to international investment managers, private banks, offshore fiduciary service providers and family offices on a range of Irish legal and tax issues for their clients; and
- advise international families on the acquisition of Irish property.





Matheson have acted for internationally mobile clients and their families for generations.

For such clients, the legal and tax expertise and the international experience of Matheson’s Private Client Team are unique among professional services firms in Ireland.

Further details of which can be accessed at www.matheson.com/services/private-client

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