



In addition to the commercial challenges, family offices face obstacles that differentiate them from other businesses. Such challenges if left unaddressed, can cause a decline in family wealth and endanger family unity. HALIOS CAPITAL is an all-inclusive, trustworthy advisor to international families, family offices and ultra-high-net-worth individuals. Our network of dedicated business partners is a powerful resource that we leverage to offer insights and unmatched services.

How we can serve you

HALIOS CAPITAL offers tailored solutions to a family's needs aimed to help them develop and prosper, securing its future for generations to come. We adopt a hands-on approach that, notwithstanding your needs or circumstances, can assist you with any requirement you may have. We can aid in specific matters or address wider scoped situations such as to design, implement and safeguard a family's wealth and future plan.

Investment Portfolios

Investment management is at the core of family offices, which may range from a modest office to a complex fully-fledged multi-service company. In the prevalingly demanding business environment, it is challenging to maintain and increase wealth over generations. **We can safeguard and help amplify your investments by:**

- Assessing the documented investment strategy, including how effective the coordination of the ongoing projects is and appraise the existing investment portfolios.

We may also help in formulating and implementing a new investment strategy

- Providing an independent evaluation of the financial objectives, ensuring they are met by the implemented investment actions
- Ensuring that investments made fall within the desired risk profile and investment horizon
- Assisting in the handling of external communications and maintaining key professional relationships
- Appraising the suitability and performance of the key members of management

Real Estate

HALIOS CAPITAL can further help you by undertaking property-related activities such as:

- Identifying, classifying and documenting the family's real estate holdings as well as any fine art and other valuable assets/collectibles
- Reviewing existing ownership status of all real estate and structure as appropriate
- Conducting an independent review of existing tenants and if needed, re-negotiating contracts for

commercial properties to reflect their market potential

- Reviewing existing property insurance agreements and negotiate more favourable terms
- Identifying new investment opportunities for better exploitation of all real estate holdings or locate buyers to arrange for the sale of non-core assets
- Introducing clients to reputable developers, designers and architects to coordinate new project developments

Banking

Banking-related services are essential to the smooth running of a family office. **Family banking functions that we can provide include:**

- Comprehensive reviewing of all current banking arrangements to obtain a clear understanding of the existing terms and conditions, fees and charges imposed, the banking institution's

financial performance, its service standards and breadth of services

- Aiding in negotiating more favourable terms with banks
- Undertake the coordination of any personal banking inquiries, credit facilities, due diligence, foreign exchange, credit cards etc.

Reporting and Record Keeping

Having proper records and ensuring there is a strong and integrated reporting culture is a core part of our services. **What we can offer you is to:**

- Maintain up-to-date, proper and compliant books, accounting records and annual consolidated reporting
- Monitor local compliance with statutory requirements and filings

- Monitor payroll, secretarial and administration services
- Monitor tax administration, declaration and world wide monitoring of tax assessment process
- Oversee the compilation and calculation of tax reporting documents concerning income, wealth and capital gains taxes for various jurisdictions

Philanthropic Management

Integral to a family office is managing its philanthropic actions, from the establishment and management of a charitable foundation, and donations to altruistic causes. We can assist in maximising the impact of your charitable endeavours whilst being tax-efficient.

Our services would involve:

- Align philanthropic efforts with family objectives and donation strategy

- Provide assistance with the planning and ongoing management of charitable institutions/foundations
- Advise on charitable activities and family representations for public duties
- Act as a contact person with other charitable bodies

Succession Planning

Ensuring smooth succession for future generations is vital to the enduring viability of a family office and the family it serves. Transferring the ownership and management is never an upfront process; our methodical planning aligns stakeholder interests and expectations, resolving financial issues and ensuring continuity. **Our related services include:**

- Ensuring agreed arrangements and structures cater to family issues and the documented succession plan

- Providing confidential advice on the implications of any decisions your family might make
- Assisting in the development of knowledge-sharing and training resources for family members
- Participating in family meetings in an advisory perspective
- Evaluating the roles of family and non-family directors and reviewing their assigned responsibilities
- Helping in the implementation of a family governance plan

Contact Details