High-net-worth individuals, family offices, and closely held, family-run businesses rely on Steptoe’s multidisciplinary private client practice to advise them in connection with the complex and often interconnected issues affecting the personal, business, and financial aspects of their investments and business activities. Our high-net-worth clients benefit from our client team approach to service that provides them with access to a dedicated team of lawyers from various disciplines combined with the personalized service that comes from having a central point of contact who serves as a trusted adviser, coordinating the various services and legal and business issues.

Generations of families with investments, residences, and business interests around the globe turn to our private client practice for seamless representation and counsel on issues ranging from sophisticated estate, gift, charitable, and cross-border income tax planning and structuring to the day-to-day matters related to their business ventures and personal lives. Our clients include royal families, some of the world’s most successful entrepreneurs and business owners, and private equity and hedge fund managers.

As trusted advisers, we frequently undertake strategic, multijurisdictional counseling roles to assist with our clients’ affairs, working with clients’ family offices where they require specialized knowledge or planning skills, or serving many of the roles of a family office where there is none. Our deep understanding as to how our clients’ business interests and financial goals intersect with their personal planning needs enables us to effectively guide clients through their most important transactions, as well as events in their personal and business lives. For example, we regularly advise clients on the succession of their business interests to family members or via sale, and help resolve the full spectrum of business disputes. We also assist with the planning and implementation of corporate, real estate, investment fund, and other transactions.

Clients also seek our advice on issues related to forming and investing in start-up companies, employment, immigration, intellectual property matters, commercial and other types of litigation, and the formation of not-for-profit entities, as well as all compliance issues for those entities.

Many of our clients have cross-border business interests that require sophisticated tax planning and advice. We advise clients on a wide range of corporate, partnership, and individual tax issues both domestically and internationally, working with clients’ advisers in all relevant jurisdictions.

Our deep engagement with our clients’ business and other financial transactions enables us to be particularly effective in sophisticated estate planning tools using various techniques such as grantor retained annuity trusts, dynasty trusts, and sales and gifts to intentionally defective grantor trusts.
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