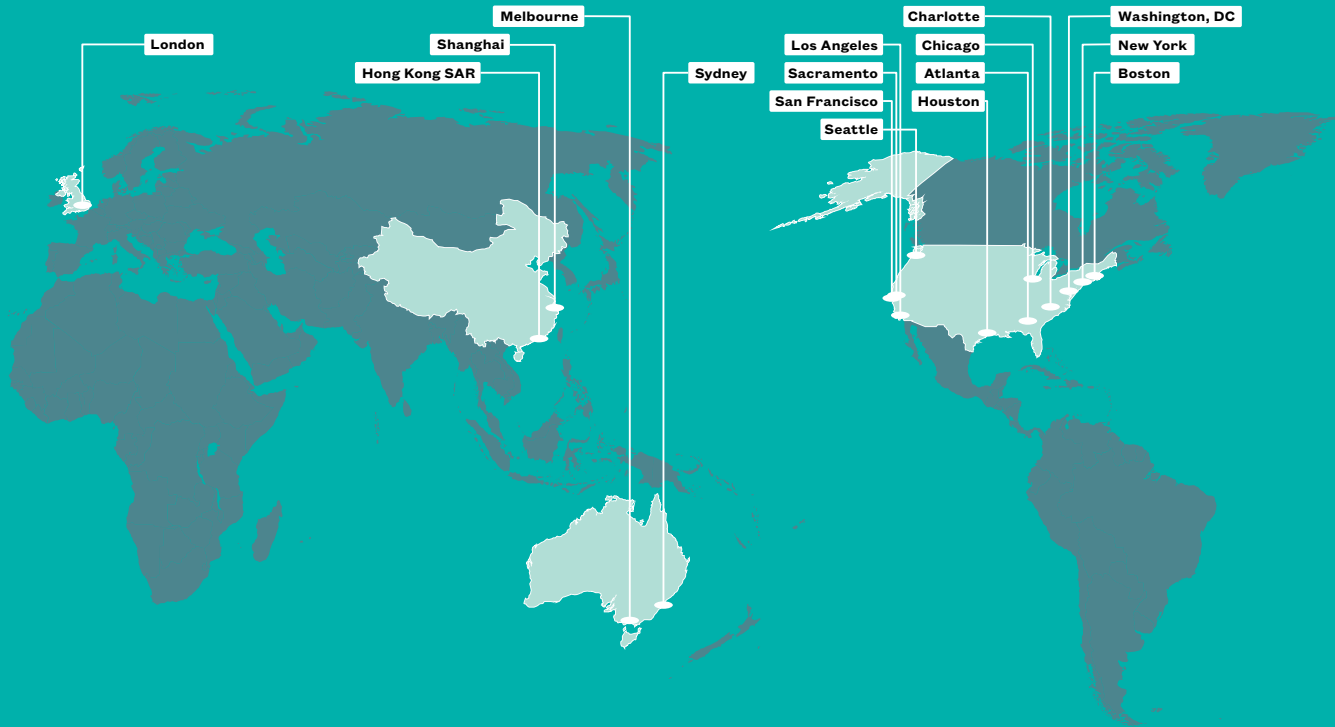




# Family Business Services

# Your needs serviced through an international model.

## AN INTERNATIONAL FOOTPRINT



For generations, Seyfarth attorneys have served as trusted advisors to family-owned businesses and family offices.

## **Delivering Effective Solutions:**

**Succession  
Planning**

**Retirement  
Planning**

**Business  
Planning**

**Deal and  
Investment Planning**

**Divestment  
and Exit**

# Corporate Offering

Our multidisciplinary team helps families and family-owned businesses establish and manage family offices, create trust and estate structures, manage investments, handle mergers and acquisitions, navigate complex tax issues, overcome day-to-day legal issues, and prepare for succession and exits when the time is right.

## Mergers & Acquisitions

Our M&A team has been engaged in more than 200 transactions across a diverse range of industries over the last two years. We frequently assist family-owned businesses and family offices with mergers, acquisitions, debt financing, and equity investments in portfolio companies.

# Investing

Family offices have become major players in the investment landscape. Seyfarth has decades of experience providing innovative legal counseling with respect to nearly every conceivable type of investment in leading global markets. We help family offices with investments in technology and emerging companies, family office-funded incubators, private equity, and hedge funds.

## Impact & ESG

Seyfarth's cross-disciplinary, global ESG team assists companies driven by or responding to stakeholder capitalism, impact companies, and B corporations through a variety of ESG issues and contexts. Our holistic approach provides a full range of services across the ESG landscape.



# Tax-Exempt Entities

Seyfarth counsels a diverse group of tax-exempt and nonprofit organizations, including family trusts and private foundations.

Our Tax-Exempt Organizations attorneys have extensive experience with program-related investments, mission-related “impact” investing, and advising private foundations in their grant-making and investments, including when co-investing with family office funds.

We assist families in developing foundation boards and junior boards to encourage family dynamics and engage the next generation in philanthropy, crafting complex grant agreements, and charitable gift planning in advance of expected capital events, including the sale of a business.

# Trusts & Estates

Our Trusts & Estates attorneys have prepared thousands of estate plans and administered countless trusts and estates, giving them broad experience and insight into the complex and sometimes conflicting matters faced by families and family offices.

We provide a wide range of legal services regarding tax and wealth transfer planning, administration and distribution of trusts and estates, fiduciary duties of trustees and executors, and family philanthropic planning.

As part of a full-service global firm, our team is able to draw upon experienced lawyers and provide targeted services across a number of areas that often impact family-owned businesses and family offices, including:

Capital Markets

Investment Management

Regulatory Compliance

Corporate Governance

Labor & Employment

Succession Planning

Data Privacy & Security

Litigation

Tax

Finance

Mergers & Acquisitions

Trusts & Estates

Fund Formation

Private Equity & Venture Capital

Intellectual Property

Real Estate



# Accolades

---

## ***US News & World Report***

“Best Law Firms” recognized Seyfarth’s Corporate Law, Mergers & Acquisitions Law, Tax Law, Non-Profit/Charities Law, and Trust & Estates Law practices.

---

## ***The Legal 500***

Recognized as leading middle market M&A (sub-\$500m) and tax practices.

# Recent Experience

---

- Family office on venture capital investments and investment in later stage companies in industries ranging from technology to real estate

---

- \$50 million family trust investment in co-living properties

---

- Joint venture between a family investment vehicle and Tokyo Stock Exchange listed company to expand restaurants in the US

---

- \$35 million family trust investment in student housing projects

---

- Family office funded incubators and a range of start-up external general counsel issues (spanning a rangy area of corporate such as family member buy-outs, company sales, compliance, service agreements, etc.)

---

- Family office with sophisticated charitable giving relating to CRUTs and California state income tax-related estate planning transactions

---

- Family office investments in technology and emerging company investments (e.g., crypto and blockchain), including review and drafting of term sheets, financing documentation (institutional, alternative, and novel financings), and organizing/ governance documents/investor rights agreements

---

- Inter-family office lending arrangements, employment and independent contractor arrangements

---

- Family trust on new restaurant deal investments, tax structuring on family office investment vehicles, lending on real estate transactions, investments in bank entities, and trust and estates for executives

---

- Family office subsidiaries in litigation, employment and counseling needs

---

- Transactions to deploy capital and technology for the establishment of physical infrastructure, off-grid power, clean water, connectivity, healthcare, job creation, sustainability, and environmental impact

---

- Trust company with complex charitable giving matters

---

- Family businesses on day-to-day employment issues, separation agreements, employee handbooks, arbitration and confidentiality agreements

---

- Private foundations transforming into social venture capital funds

---

- Private foundations with initial and program-related investments, using grant-making procedures to efficiently employ impact investments that count toward annual charitable distribution requirements

---

- Family-owned cable company with an ESOP transaction

---

- Family office structuring an executive employment agreement for a new CEO and President



“Seyfarth” and “Seyfarth Shaw” refer to Seyfarth Shaw LLP, an Illinois limited liability partnership. Our London office operates as Seyfarth Shaw (UK) LLP, an affiliate of Seyfarth Shaw LLP. Seyfarth Shaw (UK) LLP is a limited liability partnership established under the laws of the State of Delaware, USA, and is authorized and regulated by the Solicitors Regulation Authority with registered number 556927. Legal services provided by our Australian practice are provided by the Australian legal practitioner partners and employees of Seyfarth Shaw Australia, an Australian partnership. Seyfarth Shaw (賽法思律師事務所) is a separate partnership operating from Hong Kong as a firm of solicitors.

©2022 Seyfarth Shaw LLP. Attorney Advertising.

Prior results do not guarantee a similar outcome. #19-6890 M4

[www.seyfarth.com](http://www.seyfarth.com)