

Family Office

Cozen O'Connor's Family Office Practice operates at the nexus of law, business, technology, and legacy planning. We work with high net worth clients to establish, develop, and operate sophisticated family offices that can efficiently address the needs and priorities of each family. Our multidisciplinary team includes practitioners from across the firm's robust full-service platform and provides integrated counsel in all areas related to family office formation and operation.

Family Office Formation

Through careful and systematic analysis, our seasoned professionals help clients make informed decisions about whether to pursue formation of a single family office, restructure an existing family office, or utilize another type of family office platform.

We design family office solutions to suit the specific needs of each client and each family. Our legal and operational recommendations are always rooted in and informed by the histories, dynamics, personalities, and aspirations that make every family unique.

Development & Operations

The firm advises clients on the structure, scope, and technological solutions most appropriate for their family office, combining decades of experience with a commitment to continued innovation.

Cozen O'Connor provides world-class legal counsel in a range of specialties core to family office development and management, including corporate, M&A, tax, securities, trust and estate planning, litigation, labor and employment, and intellectual property.

HomeBase, The Family Office @ Cozen O'Connor

The firm also offers independent family office services through HomeBase, a non-investment advisory multifamily office platform. The first and only program of its kind in the Am Law 100, HomeBase utilizes state-of-the-art technology, security protocols, and dedicated staff to provide comprehensive family office support, including wealth aggregation, financial reporting, bill pay, payroll, alternative investment tracking and reporting, foundation and trust administration, data privacy and cybersecurity, and other back-office operations.

Steadfast Support

Cozen O'Connor's attorneys provide ongoing legal support, working closely with family members, family office professionals, and other outside advisers to ensure long-term success.

The firm's preeminent **Private Client, Trusts and Estates Practice** represents individuals and families, as well as their executors and trustees, in estate planning, trust formation and administration, estate settlement, tax structuring, philanthropic strategies, and litigation.



Helene S. Jaron

Co-Chair, Private Client, Trusts and Estates

hjaron@cozen.com
Phone (215) 665-4657
Fax (215) 701-2207



Stuart R. Morris

Member

smorris@cozen.com
Phone (561) 750-3850
Fax (561) 245-6205

Related Practice Areas

- Aviation
- Corporate
- COSECURE
- Immigration Policy & Strategy
- Labor & Employment
- Mergers & Acquisitions
- Nonprofit & Tax-Exempt Organizations
- Private Client, Trusts and Estates
- Real Estate
- Tax

Industry Sectors

- Aviation