

MSM Family Office



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MSM is an independent financial advisor incorporated in DIFC and licensed by Dubai Financial Services Authority (DFSA), dedicated to providing wealth management services to global families.

MSM team brings over 100 years of combined investment management and intellectual capital

MSM believes that to be an effective Family Office, families need to have a trustworthy, impartial and dependable partner

MSM understands that effective Family Offices must be aligned to the vision of families wealth objectives and respect the confidential nature of the relationship and place these interests and objectives above all

MSM understands the needs for families to diversify their investments outside the traditional asset classes

Our underlying investment philosophy focusses on the following discipline

- Use macro-economic views to drive our allocation process
- Coordinate with Third Party managers to invest in special themes
- Use technical indicators to drive your Tactical portfolio investments
- Arrange co invest opportunities in markets where we have expertise

MSM is able to provide its clients with various services including:

- Advising on Financial Products
- Arranging Deals in Investments
- Arranging Credit and Advising on Credit
- Arranging Custody



- We work closely with our clients to help simplify their financial affairs to ensure they are easily understood by all family members. We help structure, manage and monitor the investments of our clients by aligning our services to meet their objectives
- We actively seek specialist advisors and open architecture solutions to ensure our clients are provided with the most appropriate and relevant advice
- We partner with trust and fiduciary specialists and boutique investment managers to deliver an integrated family office service
- **MSM** utilizes ADVENT portfolio software to allow families to consolidate their global investment portfolios to allow for better decision making and risk management. MSM prepares customized reporting to meet their individual needs in managing their wealth

Family Governance and Concierge Services

- Incorporate non financials assets into consolidated reports
- Organize payment of and accounting for family expenses
- Maintain an inventory of client assets including relevant documentation
- Co-ordinate property management with professional service providers

Portfolio Reporting

- Asset allocation and detailed investment reporting
- Investment Idea generation and screening of financial markets
- Proactive market outlooks with regular monitoring of all asset classes

Active Advisory and Trading

- FX, commodities and interest rate market views
- Proprietary charting and technical analysis
- Access to institutional research

Risk Management

- Identify missed opportunities and unnecessary or unwarranted risks
- Analyze risk using proprietary investment tools
- Help evaluate and monitor third party investment managers

“Shirt sleeves to shirt sleeves in three generations”

The passing of the patriarch / matriarch can be the biggest threat to a family’s wealth. Taxes, family infighting, management disarray can singly or jointly destroy material wealth. Whether the family wealth stays under one umbrella or whether individual members pursue independent interests, there must be a plan or mission statement for future generations to follow

MSM works seamlessly with family advisors and trust administrators on family governance issues to ensure families control their affairs whilst reducing costs and complexity

MSM reviews existing and/or develops new structures to ensure they meet the families’ vision while adhering to relevant tax and legal considerations

MSM can act as protector or investment advisor to family structures where institutional service providers are unable or reluctant to serve

CONTACT US

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