

Family Office

“I consider Davies to be the platinum standard for North American law firms. The team is simply the best.”

Client – *Chambers Canada 2022*

Today’s high-net-worth individuals and families face increasing complexities when planning for the preservation and expansion of wealth. Family offices have increased over the last decade with evolving needs and sophistication.

Foresight and skill are required to navigate succession planning, wealth transfer, industry and business diversification, conflict management and philanthropic goal implementation. With investments, assets, businesses and family members located around the globe and influenced by dynamic markets and world events, clients require savvy counsel.

Wealthy families both inside and outside Canada have trusted Davies’ counsel for over a century. From day-to-day operations to long-term planning and crisis response, families choose us because we are as committed to our clients’ success as they are. Our lawyers offer responsive and professional service, bespoke strategy, flexibility, creativity and a track-record of success.

We provide technical investment strategies for cross-border tax, trusts and estate planning. Our lawyers help family offices manage intergenerational issues, including next generation succession. We understand the needs of establishing independent structures or creating non-traditional partnerships in a range of investment classes. With significant private equity experience and clients, Davies offers wide-ranging solutions to complex issues.

Our holistic approach is aimed at the preservation and growth of multi-generational wealth involving areas such as tax, private equity, real estate, dispute resolution, investments and joint ventures, private client, securities regulation, and the creation of private foundations. We build strong relationships. With our experience, families rely on us for structurally complex and personally sensitive matters. Providing counsel in periods of continuity and in transition, we deliver solutions tailored to each family’s dynamics, priorities, needs and objectives.

Our multi-office team delivers sophisticated planning across borders and practice areas. We take a multidisciplinary and collaborative approach to ensure that our advice considers not only common family office issues and anticipated challenges, but also nuances and the unexpected. This approach helps us navigate the implications of foreign tax regimes for Canadians, move wealth into Canada or elsewhere, prepare for bet-the-company litigation, and align and execute private investment strategies.

RECOGNITION

Chambers Global: The World’s Leading Lawyers for Business

- Capital Markets
- Corporate/M&A (Band 1 firm)
- Disputes (International and Cross-Border)
- International & Cross-Border Transactions (Band 1 firm)
- Tax (Band 1 firm)

Chambers Canada: Canada’s Leading Lawyers for Business

DAVIES

- Capital Markets
- Charities/Non-profits
- Corporate/M&A (Band 1 firm)
- Investment Funds: Fund Formation (Band 1 firm)
- Litigation: General Commercial: Ontario (Band 1 firm)
- Litigation: General Commercial: Québec (Band 1 firm)
- Private Equity: Buyouts
- Real Estate: Nationwide
- Real Estate: Ontario
- Real Estate: Québec (Band 1 firm)
- Tax (Band 1 firm)

Chambers High Net Worth Guide—Private Wealth Law: Canada (Band 1 firm)

Mergermarket North America M&A Awards—Canada M&A Legal Advisory Firm of the Year (2021)

IFLR Americas Awards—National Corporate Firm of the Year: Canada (2018, 2021)

IFLR1000 Canada

- Capital Markets: Ontario (Tier 1)
- Capital Markets: Québec
- Mergers and Acquisitions: Ontario (Tier 1)
- Mergers and Acquisitions: Québec (Tier 1)

International Tax Review's *World Tax: The Comprehensive Guide to the World's Leading Tax Firms*

- Tax (Tier 1 – Canada)
- Tax Controversy (Tier 1 – Canada)
- Transactional Tax (Tier 1 – Canada)

Benchmark Canada: The Definitive Guide to Canada's Leading Litigation Firms & Attorneys—Ontario and Québec Provincial Litigation Firms (Highly Recommended)

The Legal 500 Canada

- Capital Markets
- Corporate and M&A (Tier 1 firm)
- Dispute Resolution: Ontario (Tier 1 firm)
- Dispute Resolution: Québec (Tier 1 firm)
- Real Estate and Construction (Tier 1 firm)
- Tax (Tier 1 firm)