

ANTHONY & CIE, THE 'FAMILY OFFICE' ... we save you time!

As a 'One Stop Shop', Anthony & Cie provides advice under one roof covering several areas with one objective in mind which is to save you time and give you peace of mind.

Case study: Richard Hamilton*

This case study illustrates the benefits of a Family Office. 'As I own my own company, I travel often. Previously, I was a director of an international company, and now I'm self-employed. I'm very busy and I don't always have the time to deal with my own affairs, or the time to study their tax and administration implications. On account of my circumstances, a Family Office is the ideal solution to globally manage my interests'. The principle of a Family Office has existed for several centuries. High net worth families entrusted the management of their finances to a dedicated group of experts.

Richard, a British citizen in love with France and in search of the sun, decides with his American wife, to buy a luxury property on the Cote d'Azur. But they are soon confronted with language difficulties and cultural differences when dealing with the tax aspects the law and property. Anthony & Cie is available to handle the different stages of Richard's real estate project.

How can Richard acquire a property with the best structure?

Anthony & Cie has set up 'Anthony Investments' which is dedicated to handling real estate transactions. There are two possibilities: either Anthony Investments helps Richard to find his dream property or Richard has already found his paradise on earth. In both cases, Richard can benefit from the Family Office's help in coordinating the different stages of the purchase: analysis of the sales contract, creation of the structure best adapted to purchase the property (a company incorporated in France), legal representation, etc. Including sound advice on how to handle French bureaucracy. Richard Hamilton has now found his dream property. He knows that depending on his situation, it is advisable to purchase it through a company. All he needs to do now is find the finance...

Which bank should he choose?

As an authorised broker, Anthony & Cie's network of banking profes-

nals allows Richard to find the most appropriate financing to suit his requirements, taking into account his global tax situation and his circumstances. Now that the company has been created and registered, who can manage it?

Who can manage the running of the company?'

Anthony & Cie can help Richard manage his property efficiently: provision of registered offices, day-to-day management of the company (book-keeping, settling invoices, accounting), liaison with independent professionals (architects, lawyers, insurance companies), dealing with payroll and its issues, etc.

And from a tax and financial perspective?

Thanks to the team at Anthony & Cie and to their network of independent professionals (tax lawyers, notaries, accountants, etc.), Anthony & Cie can help Richard with all his tax returns (income tax, wealth tax, 3% tax). Anthony & Cie can also carry out an audit of Richard's assets in order to optimise the transmission of the property and his investments to future generations.

As the principal coordinator, the Family Office brings total serenity and peace of mind.

Richard is a happy man: all of his projects (property purchase, financial planning and investments) are managed by a team of experts all under one roof. With peace of mind, he can now concentrate on his family and beating his friends at golf!

Robert Anthony

**This case study is based on information taken from several case studies. The character of Richard Hamilton is purely fictional and not based on any real person.*



Anthony & Cie

Financial Planning

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