

When Do I Need to Consider a Family Office?



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Managing significant wealth brings complexities that often extend beyond traditional financial planning. As your personal financial enterprise becomes complicated, so do the challenges of coordinating investments, tax planning, estate considerations, and philanthropic efforts. This is where a family office becomes invaluable. But when should you consider establishing one?

When to Consider a Family Office

A family office is a dedicated team that helps streamline and manage the many aspects of a family's life. From growing and protecting wealth to supporting long-term goals and handling day-to-day needs, we bring everything together with a clear, coordinated strategy. Determining the right time to establish a family office depends on several factors. Here are key indicators you might be ready for a family office:

1. Increasing complexity in wealth

Significant wealth often leads to exciting opportunities, but handling everyday tasks, relationships, and other complexities can be overwhelming. A family office is a private team that centrally provides services to your family.

2. Significant growth in net worth

While there is no set threshold, families with assets exceeding \$20 million often find a family office beneficial. Early planning is key for those with rapidly growing wealth or anticipating major financial events.

3. Desire for integrated services

Coordinating between multiple advisors (legal, tax, investment) can be challenging. A family office streamlines communication and aligns strategies with your long-term goals.

4. Multi-generational wealth planning

Preserving wealth across generations requires thoughtful succession planning, education, and governance structures—core components of family office services.

5. Privacy and confidentiality

Families concerned about data privacy and financial confidentiality benefit from the discreet, secure services a family office provides.

6. Philanthropic interests

A family office can help structure your philanthropic endeavors, seeing that donations align with family values and provide maximum impact.

7. Business transition

If you are preparing for a business sale, inheritance, or other major financial event, a family office can assist in managing the complexities and opportunities that arise.

Benefits

At Dean Dorton, we understand that managing substantial wealth involves more than just numbers. [Our family office services](#) are designed to provide a comprehensive, relationship-driven approach tailored to your unique needs. We offer:

- **Comprehensive Approach:** A defined strategy that includes your unique family structure, generational transitions, and lifestyle.
- **Customized Solutions:** Services tailored to your family's unique needs and interests, scalable for future generations.
- **Central Point of Coordination:** A dedicated team serving as your primary point of contact for all family office matters.
- **Generational Wealth Preservation:** Strategies focused on maintaining and enhancing wealth across generations.
- **Expert Guidance:** Nationally and internationally recognized professionals with extensive experience in complex family group structures.
- **Proactive Legacy Planning:** Forward-thinking planning that aligns with your family's philanthropic, civic, and legacy goals in coordination with your team of professional advisors.

Our experienced professionals work closely with you to simplify the complexities of your personal financial enterprise, enabling you to focus on what matters most to you and your family.

Is It Time to Consider a Family Office?

If your financial affairs have become increasingly complex or you are preparing for a significant financial event, now may be the right time to explore family office solutions. Dean Dorton is here to guide you through every step of the process.

[Contact us](#) today to learn how our family office services can help you preserve, grow, and transfer your wealth with confidence.