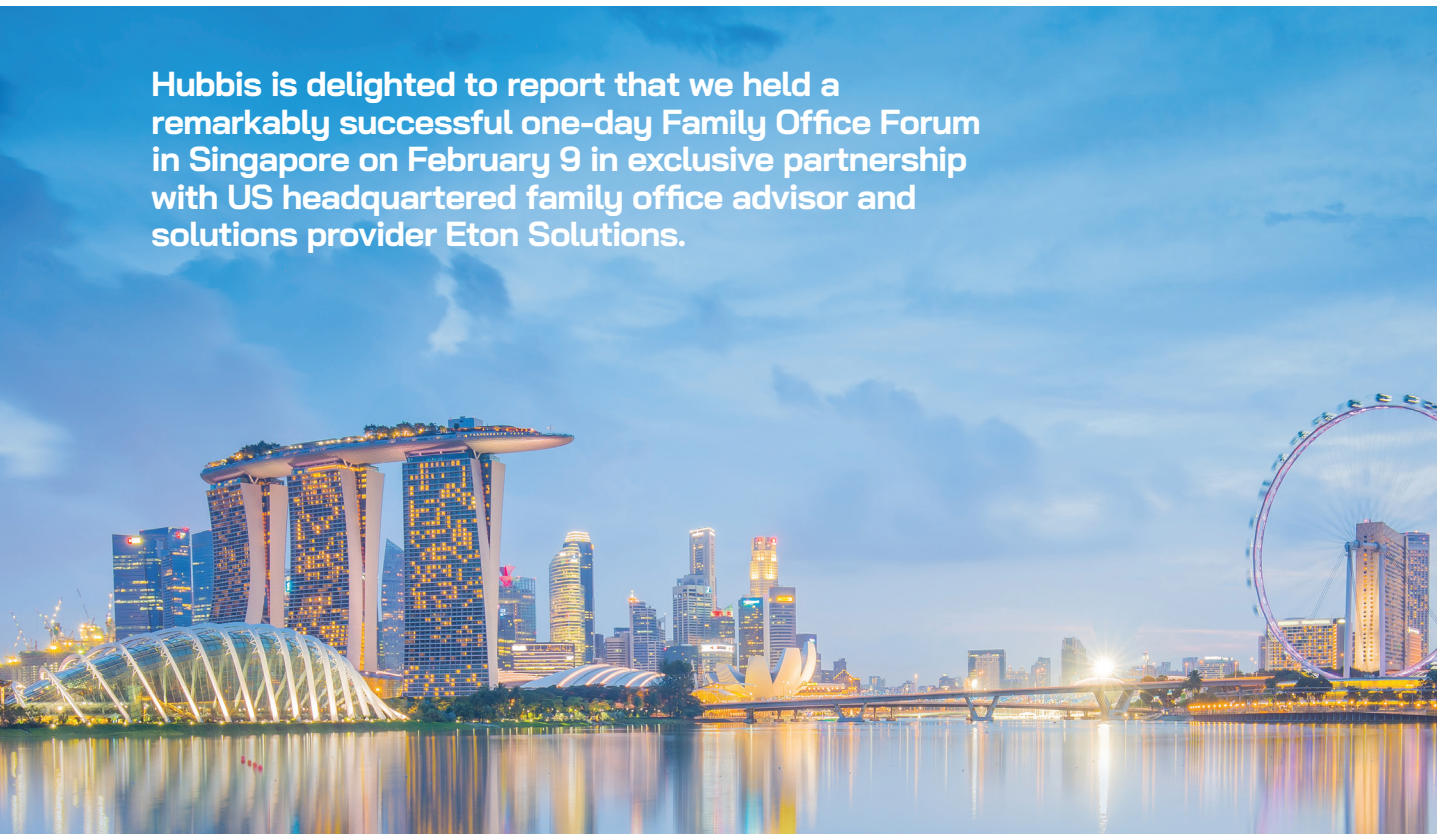


The Family Office or the Investment Office Trust? Leading Private Client Lawyer Zac Lucas Elucidates

Hubbis is delighted to report that we held a remarkably successful one-day Family Office Forum in Singapore on February 9 in exclusive partnership with US headquartered family office advisor and solutions provider Eton Solutions.



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ZAC LUCAS
Spencer West

The event was sub-titled 'Creating & Operating a Modern, Efficient and Fit-for-Purpose Family Office' and brought together speakers and attendees from

Single-Family Offices, Multi-Family Offices, private banks, independent wealth firms, trustees, lawyers, accountants, consultants, immigration specialists, regulators and other experts from the wider family office and wealth management ecosystem.

In a detailed and highly informative Workshop at the event, leading Singapore-based international private wealth lawyer Zac Lucas, Partner at Spencer West, offered delegates some invaluable insights into important issues for sponsors and advisors to consider relating to the choice of the Family Office or the Investment Office Trust.

He looked at the key Family Office Market Segments and the key differences and nuances between

typical North Asia sponsors and Southeast Asia founders. He analysed the key features of the Investment Office Trust and highlighted where drafting errors can most likely occur and did the same for the Family Office Trust.

He concluded with his recommendations that whether the choice is the Investment Office or the Family Office Trust, both must be carefully structured to ensure survivability of the structure, to make sure there are no key pitfalls ahead in terms of drafting errors at the early stages, and there must be good governance to cover the families, the control, the operations and also succession. ■

