Balancing new-age wealth ambitions with timeless family traditions

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While the "great wealth transfer" is a familiar narrative in family office discussions, its pivotal role in shaping wealth management, legacy, and intergenerational strategy continues to be of paramount importance.

With the impending transfer of trillions, the spotlight on the "next gen" — Millennials, Gen Z, and Gen A, all of whom are digital natives — is more intense than ever. This shift extends beyond the financial: it's about passing on values, ushering in new responsibilities, and embracing innovative thought.

Spotlight on the next gen

At Ogier, we understand the unique dynamics that come with advising both family offices and ultra high net worth individuals. Our expertise in creating and managing wealth structures, such as trusts and foundations, ensures resilience and adaptability to meet the evolving needs of diverse families. As the next gen explores emerging asset classes like cryptocurrencies and shows a deep interest in sustainable and impact investing, Ogier's tailored services are designed to support these new directions.

Embracing new asset classes

The wealth landscape is becoming increasingly global and diverse, with more international connections, female leadership, and varied family constructs. This complexity calls for a refined approach to wealth transfer, where understanding tax implications, maintaining transparency, and managing cross-border issues are essential. Ogier's advisors are equipped to empower the next gen with the insights needed to make informed choices.

As the concept of wealth evolves to include a stronger focus on ethical investments and impactful philanthropy, Ogier stands ready to advise on structures that align with the values of a new generation while respecting the legacies of the past. We facilitate a seamless integration of new investment classes and ESG considerations into traditional wealth preservation strategies.

Balancing innovation with legacy

Technology's role in shaping investment choices is undeniable, and Ogier is at the forefront of incorporating digital tools and ethical investment options into family wealth strategies. This leads to more open discussions about wealth, with governance structures evolving to reflect the next gen's values and vision.

As advisors, we must balance the new with the old, ensuring wealth preservation strategies respect both the innovative impulses of the next gen and the established legacies they inherit.

The role of the advisor in this transition is more critical than ever. Our team excels in bridging generational divides, aligning diverse interests, and crafting strategies that resonate across generations. We provide clear communication, flexible frameworks, and a collaborative approach that are essential for navigating the complexities of intergenerational wealth transfer.

Ogier's global reach and expertise position us as a leading advisor in private wealth management, ready to navigate families through the generational shift in wealth. By encouraging open dialogue and understanding across generations, we help integrate the unique perspectives of the next gen into cohesive wealth management strategies.

With the next gen poised to take on the mantle of wealth custodianship, Ogier offers forward-thinking, responsive, and personalized services to foster robust structures that reflect each generation's distinct approach to wealth. Ensuring that family legacies not only endure but thrive in the hands of those to come is at the heart of what we do. Ogier's global presence and innovative spirit mean the future of wealth management is not just promising but poised for transformation. Our team's commitment is to ensure that every family's wealth journey is navigated with confidence, securing legacies for generations ahead.

How Ogier can help

Our family wealth services ensure that you are prepared for the future today. We help shape lasting legacies and make a meaningful impact for generations to come.

We're experienced in working with a range of family offices, their advisors and providers internationally, offering bespoke solutions for wealth structuring, succession planning, tax efficiency and asset protection.

About Ogier

Ogier is a professional services firm with the knowledge and expertise to handle the most demanding and complex transactions and provide expert, efficient and cost-effective services to all our clients. We regularly win awards for the quality of our client service, our work and our people.

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