

MULTI FAMILY OFFICE

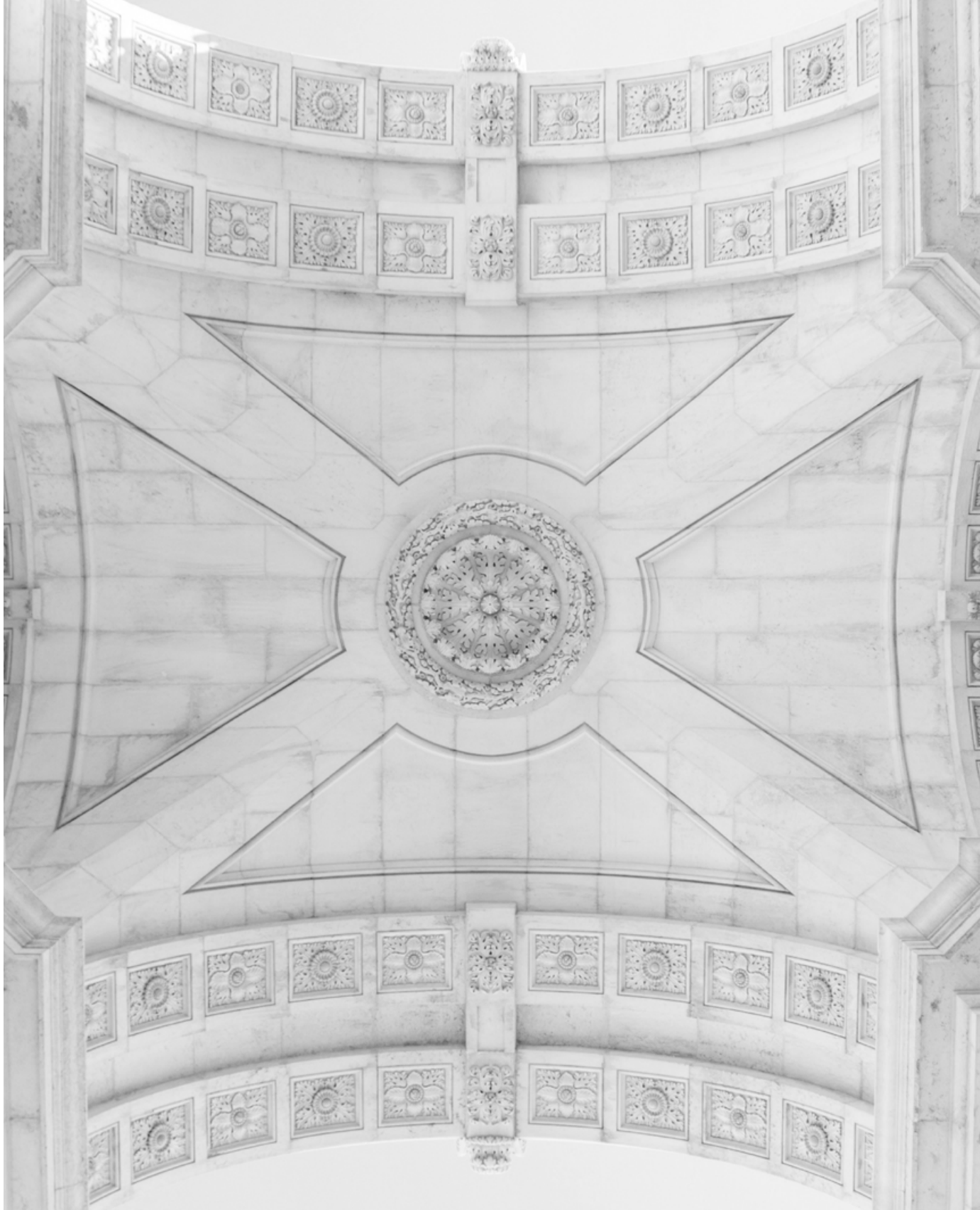
fidinam

MULTI FAMILY OFFICE
MONTE CARLO

fidinam



Providing Family Office services since
1995 in Monte Carlo.



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Fidnam Multi Family Office

At Fidnam Multi Family Office we provide wealth advice in order to help clients preserve their assets and secure a legacy for future generations.

Listening to clients' needs, constant communication and confidentiality are core to the business of Fidnam Multi Family Office.

Close relationships allow us to anticipate needs and help our customers to prepare for future developments and challenges.

We adopt a holistic approach to make sure your business and personal wealth are preserved.

We believe nothing should be neglected.

In Monte Carlo since 1995

We combine our expertise and local knowledge with international connections and experience.

Established in Monte Carlo back in 1995 as a Single Family Office service, we converted our company from a Single to a Multi Family Office in 2018.

Today, we are able to serve multiple families through Fidnam and its professionals around the world.


Our team is highly skilled in multiple and diverse fields: our experts in legal and compliance interact with finance and accounting to combine a variety of knowledge and approaches.

Global Presence

Fidinam Multi Family Office offers the dynamism required to protect families’ assets worldwide. In a rapidly changing environment, Fidnam Multi Family Office helps families to keep abreast of ever-changing jurisdiction requirements.

Backed by an international group, we operate in more than 90 jurisdictions through our affiliates and correspondents: from Monte Carlo to Hong Kong, Fidnam as a group advises on wealth planning internationally, with a consideration of our clients’ lifestyles.





Delivering excellence through comprehensive
offers of tailor-made services.

Our Services

We are committed to offering the best-in-class suite of services for our clients, operating with trust and discretion.

Our services cover the full range of needs from our clients: we are distinguished by our excellence in acting as a one-stop-shop for families and Ultra High Net Worth Individuals, taking care of each and every aspect of wealth planning and monitoring.

From assisting in relocation and taking care of administrative and real estate matters, to accurate wealth and tax planning constantly monitored through our digital platform, Fidinam Multi Family Office acts as a discrete, efficient and thoughtful partner in assisting our clients.





Wealth planning

We help our clients to optimize their investment through accurate planning. Our highly skilled team is able to structure your wealth by examination through multiple lenses.

We have the skills and the infrastructure to leverage the market and efficiently plan taxes and investments across borders.

Operating with extreme discretion, our consultants provide tax and legal advice on inheritance law and the establishment, management and supervision of asset protection structures, such as trusts, fiduciary services and foundations, as well as on the execution of wills.

It is your right to leave your legacy in the most efficient hands, and we are able to offer all the trust you need for accurate planning.



Asset monitoring & Reporting

We help our clients to never lose sight of their financial and business situations.

Through our best-in-class digital platform, we provide a holistic overview of your asset situation, including bankable and non-bankable assets, highlighting relevant information and structuring your wealth through generations.

Powered by Swiss financial technology tool, we ensure unparalleled transparency over Clients' wealth, while ensuring total confidentiality about their data. Having data securely stored in servers based in Switzerland, we combine strict security protocols with groundbreaking reporting tool.

We make it simple for our clients to be constantly aware of how their assets are being managed, providing a holistic overview of multiple-asset, relationship and service providers, through a wide range of countries and currencies.



Administration & Accounting

We help entrepreneurs to grow and maintain their private and business wealth by providing tailor-made and in-depth consultancy on matters dear to families and their businesses.

We make sure day-to-day operations are administered effectively, providing accounting, management of current bank accounts and secretarial services. Our professionals ensure that the family is not burdened with administrative details, so that they can focus on more important matters.

Whether it concerns family or enterprise administration tasks, we can help to take care of the boring side of business.



Legal & Compliance

Our clients can feel relieved of stress related to legal matters, and offload onto us all compliance and legal matters related to family governance, succession planning, policies and procedures, legal drafting or research and due diligence processes.

Working alongside financial institutions and leveraging our highly skilled team, we assist our clients with the increasing challenges brought by legal frameworks and requirements.

Because of our independence, we are the trusted partner for all legal and compliance matters.



Home assistance & Conciergerie services

Our team can assist our clients in every aspect of their personal and professional life.

We provide careful assistance to entrepreneurs and their families in household management, recruiting professional home-staff and considering every aspect of settling in a new country.

Whether it is for business or personal purposes, we coordinate and administer assistants in order to ensure that family governance is effectively in place. From business meetings to evening events, we can provide assistance for every demand.



Philanthropy

We believe in playing an active role in society.

Want to give back something for what you have received in life?

We can help you to plan and manage philanthropic projects, ensuring effective governance. We have proven experience in running effective philanthropic organization: Fidiam Multi Family Office administers the Fidiam International Charity Foundation, through which we support projects in various fields such as education, culture, medical research and the fight against poverty.

Once again, we leverage our experience in your interest.



We make sure that wealth built over a lifetime preserves its meaning and is passed down for generations.



A solid network

Fidinaam is one of Switzerland's largest companies providing tax, business and real estate consulting.

Founded in 1960 in Lugano, Switzerland, Fidinaam has continuously been able to keep pace with all market changes, regularly renovating itself with new services.

In order to provide our clients with tailor-made services and assistance, Fidinaam has differentiated its lines of business into a spectrum of activities, offering a full range of services for entrepreneurs and private clients.

Our team in the Monte Carlo office is ready to welcome you with in-depth consultancy service.

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