Family Office & Private Wealth Advisory

McLaughlin & Stern's Family Office & Private Wealth Advisory practice serves families, principals, fiduciaries, and family enterprises navigating the full complexity of multigenerational wealth.

Our Approach

For more than one hundred years, McLaughlin & Stern has guided families and closely held businesses through some of their most consequential moments. This experience has made the concerns that are critical to your family deeply familiar to the partners in our firm. We've navigated them across generations, structures and family dynamics of every kind — and that knowledge is built into how we plan.

Over time, we become deeply familiar with the families we work with and their history, goals and sensitivities. That depth of understanding shapes everything we do.

Our work draws on the firm's full range of capabilities — corporate law, trusts and estates, tax, commercial litigation and private client services. Our partners develop genuine institutional knowledge of each family's circumstances, which allows us to understand the delicate nuances that are crucial to providing careful advice that reflects your actual priorities.

What We Do

Strategic Governance & Entity Architecture Establishing and refining governance frameworks for families, holding structures, operating companies, and related entities to align authority, decision rights, reporting, and accountability.

Fiduciary Structuring & Private Trust Companies Advising on the formation and governance of private trust companies and centralized fiduciary bodies, integrating trustee, director, and advisor roles for long-term clarity.

Succession & Ownership Transitions Planning and documentation for ownership transition, control succession, equity transfers, minority protections, and family governance agreements — including letters of wishes, codes of conduct, constitutions, and compacts.

Cross-Disciplinary Legal Integration Coordinating corporate, tax, trust, and estate planning with business and personal legal considerations to reduce fragmentation and improve execution.

Litigation Readiness & Dispute Avoidance Applying commercial litigation experience to governance breakdowns, shareholder or member disputes, fiduciary challenges, and sensitive transitions, with close attention to confidentiality and reputational risk.

Multi-Jurisdictional Coordination Managing planning and administration across state, national, and cross-border considerations, including Wyoming-based and foreign trust structures and international tax exposure.

Why McLaughlin & Stern

Partner-led and responsive. Our partner-driven model ensures continuity, responsiveness, and consistent alignment with client priorities.

Private wealth pedigree. The firm's Trusts and Estates and Philanthropy & Private Client practices are longstanding anchors of our work with families and high-net-worth individuals.

Recognition

McLaughlin & Stern has been recognized by *Chambers High Net Worth* as a leading firm for sophisticated private wealth clients.

Representative Engagements

- Family governance frameworks and operating protocols
- Ownership and management succession in family enterprises
- Private trust company formation and governance
- Coordinated estate, tax, and business planning
- Family foundations and philanthropic vehicle structuring
- Commercial litigation tied to governance and fiduciary risk

Practice Leadership Robert Agresta, Chair

Contact McLaughlin & Stern, LLP 260 Madison Avenue, New York, NY 10016 (T) 212-448-1100