

# Client case study

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Work on a day-to-day basis with the professional family office investment team and meet periodically with family member principals

Provide detailed performance and risk analytics for asset class partnerships

Provide complex cross-trust strategic portfolio design services with risk overlays

Advise family office executives on ad hoc basis regarding special projects

Greycourt has worked with this client, a multi-generational family office, for the past two years. We were brought in by the new CEO of the family office after a competitive advisory firm search.

This is a sophisticated family office with an internal investment team. The family office has a separate and extremely successful RIA dedicated to real estate investing and a significant portfolio of direct commercial real estate and private market investment holdings portfolio.

Services to this client include: (1) idea generation and portfolio strategy; (2) resources for portfolio architecture, construction/implementation, risk analysis, and related analytics; and (3) manager due diligence on existing and future holdings.

## AT A GLANCE

**REAL ESTATE  
OPERATING  
BUSINESS &  
FAMILY OFFICE**

**8  
ADVISED FAMILY  
MEMBER  
BENEFICIARIES**

**3  
INVESTMENT  
TEAM MEMBERS**

**COMPLEX TRUST  
STRUCTURE**