

## Day Pitney Family Office Practice

Advising Families of Wealth and Their Businesses Enterprises

### Who We Serve

- Families of wealth, single family offices (SFOs), multifamily family offices (MFOs), and family principals across the U.S. and abroad
- Clients with investible assets from tens of million to several billion dollars
- Family-controlled enterprises and philanthropic entities

### Comprehensive Counsel for Complex Needs

- Private equity, venture capital, and direct investments
- M&A, fund structuring, and securities compliance
- Domestic and international tax and wealth transfer planning
- Real estate, employment, executive compensation, and litigation matters
- Risk management and liability mitigation

### Family Business & Governance

- Over 100 years advising family-owned and controlled businesses (privately held and publicly traded)
- Succession and ownership strategies that preserve harmony, value, and legacy
- Governance frameworks that emphasize education, communication, and shared values
- Advising families on SEC compliance, cybersecurity, and insider trading protocols
- Conflict resolution, mission and charter development, and operational best practices

### Estate Planning & Philanthropy

- 90+ attorneys focused on trusts, estates, and charitable giving
- Counsel to private foundations and public charities
- Integration of social impact and philanthropic goals into family business strategies and mission
- Deep experience in philanthrocapitalism and purpose-driven ventures

### Recognition

- Ranked for **Private Wealth Law** nationally and regionally by *Chambers High Net Worth 2025*
  - Including Band 1 Departments in Connecticut, Massachusetts, and Rhode Island
- “**Law Firm of the Year – Trusts & Estates Law**,” *Best Law Firms*® - (2021 & 2022)
- **Private Asset Management Awards:**
  - *Best Law Firm Estates and Trusts* - (2024 & 2025)
- **Family Wealth Report Awards:**
  - *Legal Practice* – Miami (2025)
  - *Solutions for International Americans* (2024)
  - *Cyber Security* (2023)



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Scan to Explore our  
Day Pitney's Family  
Office Practice

