

## EVENTS

### MFO vs PWM

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#### 2<sup>nd</sup> Annual Real Estate Family Office and Private Wealth Management Forum (Midwest)

Chicago, IL

September 25, 2017



Kim Kamin, Chief Wealth Strategist at Gresham Partners, LLC, spoke on a panel about Multi Family Offices vs. Private Wealth Management at the 2<sup>nd</sup> Annual Real Estate Family Office and Private Wealth Management Forum (Midwest), at the Hyatt Magnificent Mile, Chicago, IL on September 25, 2017.

- As your assets and needs develop, you may find yourself contemplating joining either a MFO or employing the services of a PWM. The question is: how to select the right approach for you and your family?
- When does a PWM makes sense? Responsibilities and duties of a PWM? Selection criteria and red flags?
- When a MFO makes sense? Responsibilities and duties of a MFO? Selection criteria and red flags?
- Why not both?

If you would like additional information, please contact Kim Kamin at [kkamin@greshampartners.com](mailto:kkamin@greshampartners.com), or 312-960-0200.