

EVENTS

MFO vs PWM

2nd 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 2nd 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, or 312-960-0200.