

# Private Asset Management

## Profile

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Our firm is one of Israel's premier full-service law firms representing private clients, intergenerational transfers and family capital management. The practice has extensive expertise, which combines consulting in complex intergenerational transfer projects and representation in complex inheritance and family disputes. The diverse expertise benefits our clients by providing comprehensive legal and strategic advice across a wide range of legal practice areas.

Our practice represents several capital and asset intensive families and provides legal advice involving personal and family related issues, together with ongoing support for their business activities, including intergenerational asset management and planning, preservation and improvement of capital and assets, as well as business, real estate, taxation and corporate related issues that require multidisciplinary examination. In addition, the practice provides representation in litigation proceedings and through various mechanisms for dispute resolution such as arbitration and mediation.

In this framework, our practice provides several unique services including, inter alia:

Complex intergenerational transfer project management, planning and preservation of family assets and establishing trusts. Our practice conducts intergenerational transfers to high-net worth families, including the establishment of various trusts, drafting agreements and family conventions as part of a long-term family process, while expressing the needs and desires of all family members. In order to ensure that the intergenerational processes are optimally established, the attorneys from our tax practice, which is regularly ranked in the highest-ranking group (Tier 1), also take part in the establishment of the trusts. In addition, our practice advises trusts, trustees, and beneficiaries of Israeli and Foreign trusts, which are incorporated under various jurisdictions, including in disputes that arise in connection with the management and supervision of the trusts' activities.

Management of complex inheritance and family disputes. Our practice represents its clients in some of the largest and most complex inheritance and family disputes in Israel, involving various rights and interests in corporations, real estate and other assets in Israel and abroad. Such disputes are adjudicated before the courts in Israel at all levels, as well as in arbitration and mediation proceedings. The practice also represents international inheritance and family disputes that are brought before courts in various jurisdictions, including Europe and the United States.

Management of estates and their distribution. Our practice managers, attorneys Reuven Behar and Shalom Hershkovitz, are constantly appointed as administrators of estates, and as such have managed several of the largest estates in Israel and abroad, including corporations, real estate and other assets. Our team has extensive and varied experience in a variety of legal and economic practices, as well as extensive experience in managing international estates and assets in Israel and abroad, including in cooperation with foreign law firms. Moreover, our practice advises heirs and estate managers on maximization of estate benefits for heirs, how to maximize the benefit of the estate for the heirs including by executing complex commercial transactions and by improving and increasing the estate assets.

Drafting Wills and financial agreements (prenuptial agreements). Our practice regularly prepares complex Wills, which include several assets in the estate (including rights in corporations, real estate properties in Israel and abroad and interests in various assets). In this context, our team assists in drafting Wills while preventing and minimizing future inheritance

disputes, as well as preserving the will of the founding generation. In addition, our team prepares prenuptial agreements (of various types), while supporting the couple, as per their status and desires.

**Family Due Diligence.** Our practice provides a unique service, which includes the assessment of the different risks involved in the process of transferring family business activity to the next generation, for the purpose of preventing family disputes and promoting capital activities in the future (IPOs, introducing new investors, etc.). Within this context, our team advises our clients with regard to optimal planning of intergenerational transfers of family businesses, without impairing the ongoing business activity, while including all family members in the examination process and with the support of experts in the various fields of activity.

**Family arbitration and mediation.** Our team has unique experience in conducting alternative dispute resolution proceedings, including family-commercial arbitration and mediation, while ensuring the rights of our clients and maintaining family relations. In addition, our practice's managers are regularly appointed as arbitrators and mediators in several complex family disputes involving high-ranking business stakeholders from Israel and abroad.

**Advice and guidance in proceedings relating to the Legal Capacity and Guardianship Law.** Our practice specializes in various proceedings relating to Legal Capacity and Guardianship Law, including the appointment of guardians for property and health related matters, revoking appointments of guardians and advising protected persons and corporate guardianships. Furthermore, our team specializes in preparing ongoing-POA's and in offering alternatives to guardianship appointments.

The practice's clients include high-net-worth families and individuals.

## Key Contacts

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## Ranking

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