EINPRESSWIRE

“A Co-investment Guide for Family Offices” Now Available at ForceFamilyOffice.com

This overview of investing with other family offices and shares best practices from decades of experience in helping family offices build generational wealth.

NEW YORK, NEW YORK, USA, July 29, 2022 /EINPresswire.com/ -- FORCE Family Office is pleased to present their latest white paper, “A Co-Investment Guide for Family Offices.”

> Co-investing is an increasingly significant part of most family office portfolios. We’re happy to share what we’ve learned about these steps with our friends in the family office community.”
>
> *Steven Saltzstein*

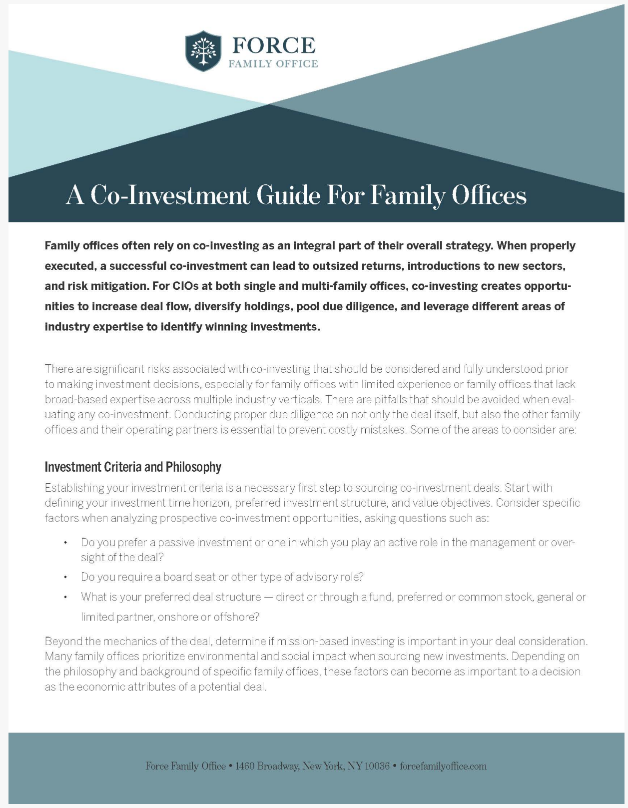
The guide is an overview of investing alongside other family offices and shares best practices from decades of experience in helping family offices build generational wealth. In a recent survey of family offices by Force, over 70% said they were interested in pursuing co-investment opportunities within the next 24 months. This paper is for CIOs of family offices who are looking to develop co-investment relationships, are curious about ways to get started, and what to consider as they evaluate opportunities.

“Co-investing is an increasingly significant part of most family office portfolios. There are steps family offices can and should take to mitigate risk. We’re happy to share what we’ve learned about these steps with our friends in the family office community.” says FORCE CEO Steven Saltzstein.

Family offices interested in receiving a copy of the co-investment guide can do so by requesting one at ForceFamilyOffice.com

About Force Family Office
FORCE is the largest network of family offices in the United States with a substantial and growing presence internationally. In 2021 alone, we hosted more than 150 events and are on pace to exceed that in 2022. Our team is dedicated to helping family offices connect for co-investment, research, education, and philanthropy.

Harvey Briggs
FORCE Family Office
harvey@forcefamilyoffice.com



FORCE
FAMILY OFFICE

A Co-Investment Guide For Family Offices

Family offices often rely on co-investing as an integral part of their overall strategy. When properly executed, a successful co-investment can lead to outsized returns, introductions to new sectors, and risk mitigation. For CIOs at both single and multi-family offices, co-investing creates opportunities to increase deal flow, diversify holdings, pool due diligence, and leverage different areas of industry expertise to identify winning investments.

There are significant risks associated with co-investing that should be considered and fully understood prior to making investment decisions, especially for family offices with limited experience or family offices that lack broad-based expertise across multiple industry verticals. There are pitfalls that should be avoided when evaluating any co-investment. Conducting proper due diligence on not only the deal itself, but also the other family offices and their operating partners is essential to prevent costly mistakes. Some of the areas to consider are:

Investment Criteria and Philosophy

Establishing your investment criteria is a necessary first step to sourcing co-investment deals. Start with defining your investment time horizon, preferred investment structure, and value objectives. Consider specific factors when analyzing prospective co-investment opportunities, asking questions such as:

- Do you prefer a passive investment or one in which you play an active role in the management or oversight of the deal?
- Do you require a board seat or other type of advisory role?
- What is your preferred deal structure — direct or through a fund, preferred or common stock, general or limited partner, onshore or offshore?

Beyond the mechanics of the deal, determine if mission-based investing is important in your deal consideration. Many family offices prioritize environmental and social impact when sourcing new investments. Depending on the philosophy and background of specific family offices, these factors can become as important to a decision as the economic attributes of a potential deal.

Force Family Office • 1460 Broadway, New York, NY 10036 • forcefamilyoffice.com

Force Co-investing Guide for Family Offices