



# PRIVATE LABEL FUNDS AS A STRATEGIC WEALTH MANAGEMENT TOOL

Private label investment funds are becoming increasingly popular among ultra-high-net-worth individuals (UHNWIs) and their family offices.

## 1. Tailored Investment Strategy

These bespoke funds reflect the family's unique philosophy, accommodating both traditional assets and harder-to-access categories—such as art, precious metals, crypto, venture capital, and digital assets—that standard funds typically exclude.

## 2. Institutional-Grade Infrastructure

Families gain access to the same professional ecosystem used by large institutions—managers, custodians, administrators—enhancing transparency, governance, and risk management.

## 3. Cost Efficiency at Scale

For portfolios above €30M, a private fund is often more economical than multiple segregated accounts. Consolidation reduces custody, trading, reporting, and compliance costs.

## 4. Privacy and Asset Protection

Assets held within the fund remain out of public view and are safeguarded under the fund's name, helping ring-fence them from personal or business risks.

## 5. Control with Flexibility

Families retain control over key decisions while outsourcing day-to-day operations.

## 6. Tax and Regulatory Advantages

With appropriate domiciliation (e.g., Luxembourg, Malta, Cyprus, Cayman Islands), private label funds can offer attractive tax treatment.

## 7. Simplified Succession Planning

Passing fund shares to heirs is far simpler than transferring individual assets. Family trusts or foundations can also be integrated.

## 8. Branding and Legacy

For many families, the fund becomes part of



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their identity—reinforcing reputation, values, and multigenerational continuity.

## 9. Attracting Talent and Partners

A regulated fund improves access to exclusive deals, facilitates co-investments, and provides a clear career path for key family office employees.

Leon MFO Investments Ltd, a regulated fund manager (AIFM), guides clients through the establishment and management of bespoke private label funds. Our team combines expertise in portfolio management and risk management with state-of-the-art software systems, personalized support and a strong network of service providers.



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