

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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