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NEW YORK INSTITUTE OF FINANCE

Global Family Office Advisory Services

Experienced judgment. Curated expertise.

For consequential decisions where the right expertise matters.



Complexity rarely arrives in one discipline.

Sophisticated family offices are built to manage complexity. Yet even the strongest organizations encounter decisions that demand expertise beyond what they maintain internally — or an independent perspective that can challenge assumptions, clarify trade-offs and accelerate action.

A direct investment can raise questions of valuation, capital structure, governance and operating risk. A portfolio decision may require market context, scenario analysis and specialist credit expertise. A significant art holding may create liquidity, financing, valuation and risk considerations. And a strategic family-office question may cross several disciplines at once.

The issue is not access to more advisors. It is knowing which expertise matters, when to bring it in, and how to connect the right perspectives around a consequential decision.

From complexity to the right expertise.

New York Institute of Finance Global Family Office Advisory Services is the applied advisory capability of the New York Institute of Finance Global Family Office platform. It gives family-office principals, executives and trusted advisors a discreet point of access to experienced practitioners drawn from participating faculty and the broader professional network.

The process begins with the question — not with a roster of consultants. We work to understand the objective, context, urgency and expertise required. We then identify the practitioner, or combination of practitioners, best aligned with the matter and help define a focused engagement.

The result: senior expertise brought to bear with precision — without forcing every need into a permanent hire, a broad consulting mandate or a fragmented search across multiple providers.

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Global Family Office Advisory Services

Where We Can Add Value

Our advisory services are designed for moments when a family office needs specialized judgment, an independent perspective or coordinated expertise across disciplines.



Direct Investments & Private Markets

Diligence perspective, private equity and venture review, complex or distressed situations, portfolio-company issues and board-level considerations.



Markets, Portfolio & Risk

Global macro perspective, capital markets, fixed income, structured credit, rates, inflation, scenario analysis and investment-committee support.



Specialized Assets

Art finance, art-backed lending, liquidity, valuation, diligence and the integration of significant alternative assets into broader family-office planning.



Family Office Strategy & Governance

Strategic and operating questions that require senior judgment, governance perspective, advisor coordination or multidisciplinary problem-solving.



Focused Decision Support

Independent review of a specific question, opportunity, risk or course of action when an additional senior perspective can sharpen decision-making.



Multidisciplinary Assignments

Issues that cross investment, operating, governance, risk or specialized-asset disciplines and benefit from a coordinated team rather than separate advisors.

One point of access. The right expertise around the table.

Curated

Expertise selected for the matter — not a public directory of names.

Connected

Access to practitioners within a broader family-office platform and professional network.

Coordinated

One point of entry when the issue requires multiple perspectives.

Flexible

Support that can expand from a focused consultation to an ongoing advisory relationship.

When the question is consequential, the first step is knowing who should be at the table.

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