



FAMILY OFFICE AND CLOSELY HELD BUSINESS GROUP

Cummings & Lockwood counsels private clients and their family offices and closely held businesses on an array of legal matters, ranging from entity planning and family governance issues to advising on the management of diverse investment portfolios, family trust structures and private foundations which are often part of large family offices. We also assist with the formation of closely held businesses and investment vehicles, including those with concentrated real estate or securities holdings.

The firm's general focus on private clients enables us to advise families on their immediate financial and investment goals, as well as on their long-term estate and charitable planning strategies.

We offer clients a multi-disciplinary approach to managing family offices and closely held businesses and deliver services that are tailored to their specific legal, business and personal circumstances, needs and objectives.

Our core services include:

CUMMINGS & LOCKWOOD LLC

