

## Enhancing Your Legacy

We combine art and science to enhance the legacies of wealth owners globally

**Delfin Private Office (Delfin) is an independent family office and wealth advisory firm with a mission to empower wealth-owners and their family offices to achieve their goals and enhance their legacies globally.**

We are global, unconflicted and provide advice that is built on knowledge, pragmatism, and technology. We are not wedded to what we know, we expect and fully embrace change to be better, and to do better for our partners.

True management of wealth transcends mere financial figures. It is about a sophisticated blend of art and science – the creativity to envision a lasting legacy combined with the precision of deep technical expertise – to enhance legacies and secure the financial futures of wealth owners globally.

**Our difference lies in our independence, the quality of our work, our inquisitive nature and the community we foster. That is why when our founders were deciding on a company name, Delfin was a natural choice, meaning “dolphin” in more than ten languages.**

**This resonates with us as dolphins are one of the world’s most intelligent animals demonstrating social intelligence and problem-solving.**

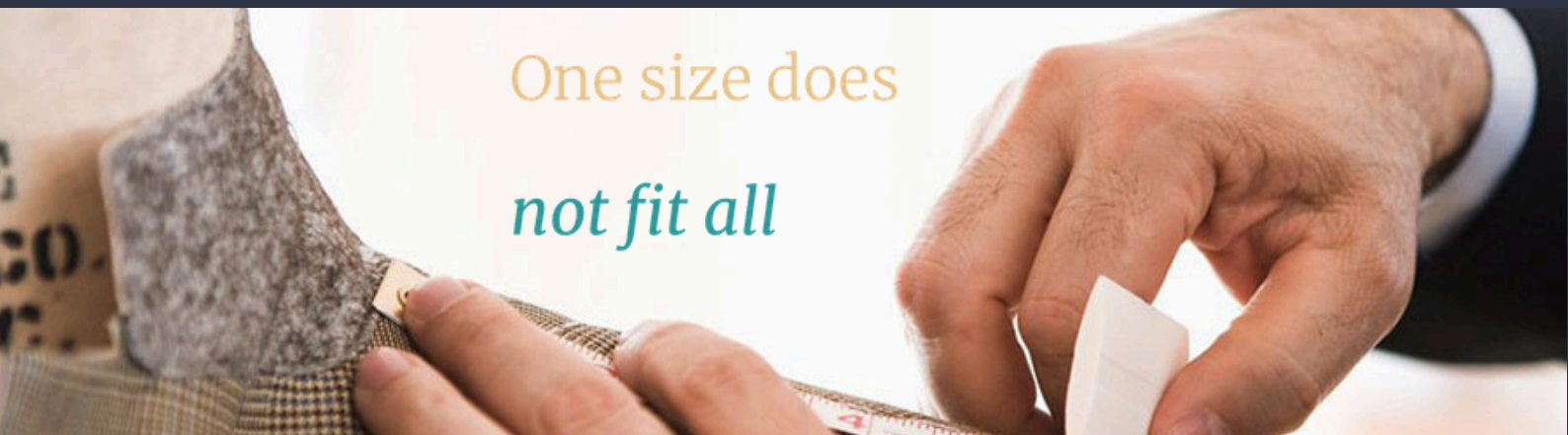




## Our Services

Delfin provides wealth-owners along with their family offices, with the support and expertise to help them achieve their goals.

No two clients ever face the same set of challenges. That is why we offer a discovery process to explore your priorities and what you are seeking to achieve and also provide the assurances you need to place your trust in us.



One size does  
*not fit all*

### Family Office Advisory

The adage 'If you've seen one family office, you've seen one family office' aptly reflects the unique nature of each family office. Every family office is distinct, just like the family it serves. Our team earns this trust through deep expertise, honed by our experience running family offices, investment funds, and family businesses. Delfin brings a unique blend of wisdom and pragmatism, delivering results that build powerful legacies and protect wealth.

### Wealth Advisory

We go beyond just giving advice. From shaping your investment strategy and building robust governance frameworks to providing hands-on deployment support, we'll work closely with you to define your financial goals and create a clear, actionable plan to achieve them.

Our expertise is proven: we currently advise on assets totalling over \$15 billion. This significant figure is a testament to our strong reputation and our unwavering ability to safeguard our clients' wealth.

## Our Family Office **advisory services**



Family office target  
operating model design



Family office review &  
relocation



Family governance  
support



Technology search &  
deployment



Philanthropy  
advice



Family education  
plan

## Our Wealth Advisory **services**



Wealth purpose &  
policy



Wealth health check &  
optimisation



Investment manager search  
& due diligence



Benchmark & passive  
portfolio construction



Responsible investing  
advisory



Outsourced OCIO  
services



## Our Team

Qualified. Experienced. Passionate



An **extraordinary** team of dedicated wealth advisers and family office specialists.

## Contact Us



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