



FAMILY **WEALTH** REPORT 2021 AWARDS WINNERS

RECOGNIZING LEADERS ACROSS THE FAMILY OFFICE AND WEALTH
MANAGEMENT INDUSTRY IN NORTH AMERICA



April 2021

CLIENT-OWNED OUR FAMILY OFFICE STRONGLY BLENDS INVESTMENT, PLANNING EXPERTISE

Tim Cestnick, Co-Founder and CEO at Our Family Office, talks to *Family Wealth Report* Group Editor **Tom Burroughes** about its accomplishments.



What sets you apart from your peers this year and why?

We are different than our peers in many respects, the three most notable being:

- We are owned, in part, by many of our clients. The interests of our firm are very aligned with our clients thanks to our shareholder makeup;
- We were born out of equal parts portfolio management and advanced

planning. Our expertise in both these areas is very significant, which has led to much better and seamless planning and capital management for clients; and

- Third, we have a strategic relationship with an MFO based out of the greater Boston area: Ballentine Partners. We share ideas, best practices, and investment research with each other, and this provides us with a competitive advantage in Canada.

How have your colleagues contributed towards the success of your organization?

Successful businesses are not generally built on one person. The strong foundation of our business is our staff. They deserve this award, and they are the real reason that we have won. Our staff are comprised of a highly knowledgeable, multi-disciplinary team that truly understands how to integrate the planning around various areas of our clients' financial and personal lives. This is no easy task.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

We will continue to execute on our plan to onboard selected families that share our values. In terms of staying ahead in our market, we continue to demonstrate how differently we invest clients' capital and can show the difference this has made to risk-adjusted returns for our clients. We

also continue to share leading-edge tax and estate ideas that are becoming even more important in a post-COVID world where taxes are due to increase.

What have been the challenges you have had to overcome to reach such a standard?

Although the principals of the firm had a following prior to our launch, we still needed to develop a track record of successful portfolio management as a firm, which we have now accomplished. We also changed course in terms of the technology we use to serve clients and provide state-of-the-art reporting - but we now have this right.

Whom do you look to for inspiration and ideas?

Before we created Our Family Office Inc., we spent some 2 1/2 years writing a business plan and interviewing over 40 multi-family offices in the US. We wanted to learn from the best and affiliate ourselves with one of them. We chose Ballentine Partners in Massachusetts. We share ideas and research with Ballentine, and they have inspired some of our thinking. We also look to some of the most successful families in this country, and abroad, with whom we have relationships, to how they deal with investment, tax, estate and family governance and continuity issues. Finally, we have a deep network of professionals with whom we collaborate to bring ideas to clients - and many of them have inspired creative thinking.

What do you hope will be the result of receiving this accolade?

We hope that this award will open the door to discussions with even more families in Canada and raise our profile internationally. We will be spreading the news widely.

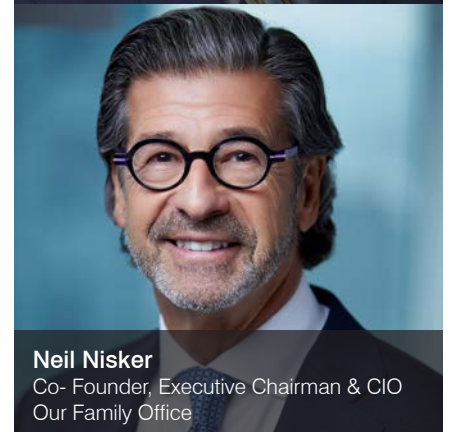
How does it help your business in this region?

Canada is a country of significant geography, but a close-knit community in many ways. News of this award will serve to demonstrate to Canadians that we are recognized beyond our borders, which will help in our business development efforts. ■

The judges unanimously chose Our Family Office Inc. as category winner. The firm offers integrated, holistic and independent solutions which are unique in the Canadian market. They bring true integration in six core areas of competency: Integrated Planning, Investment Management, Risk Management, Family Continuity, Strategic Philanthropy, and Family Administration, and this really impressed the judges.



Tim Cestnick
Co-Founder and CEO
Our Family Office



Neil Nisker
Co-Founder, Executive Chairman & CIO
Our Family Office

