

OUR FAMILY OFFICE 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 created Our Family Office not only to be different, but to make a difference. We are different than our peers in many respects, the two 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; and
- We were born out of equal parts portfolio management and advanced planning. Our expertise in both these areas are very significant, which has led to much better and seamless planning and capital management for clients.

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

Successful businesses are not generally built on one or two people. 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 a limited number of 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.



Tim Cestnick
Co-Founder and CEO, Our Family Office

What have been the challenges you have had to overcome?

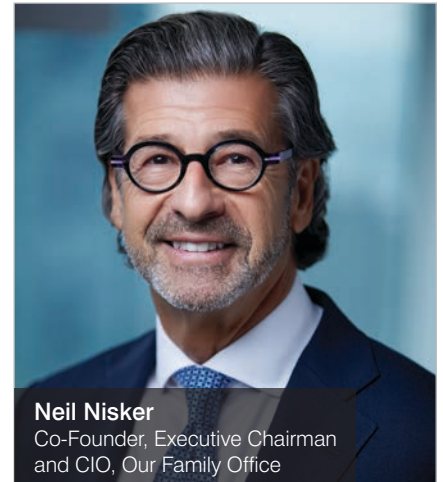
Although the principals of the firm had a following prior to our launch, we still needed to develop a track record of successful portfolio management as a firm, which we have now accomplished.

Whom do you look to for inspiration and ideas?

We wanted to bring best practices to Canada, as we felt Canadian ultra-high net worth families deserved these services. Before we created Our Family Office Inc., we spent 2 1/2 years writing a business plan and interviewing over 40 multi-family offices in the US. We also looked to 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?

As this is our second award, last year winning 'Best New Multi-Family Office in



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

North America', we hope that this new recognition will continue to open doors for discussion with Canada's wealthiest families.

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. ■

