

Family Office

Preserving Wealth. Supporting Families. Building Legacies.

A complete Family Office service delivering wealth management, governance, administration, payroll, HR, tax planning and family enterprise management.



WELCOME TO OCM FAMILY OFFICE

As wealth grows, so does complexity...

Since 2004, OCM has supported successful families, entrepreneurs and business owners through an integrated Family Office approach.

Managing investments is only one part of the challenge.

Families also require support with governance, succession planning, payroll, human resources, tax planning, Family Investment Companies, trusts, property portfolios and professional adviser coordination.

Our role is simple:

To become your family's trusted executive team.

The Modern Family Office

Most advisers focus on one area. **We focus on the entire family enterprise.**

Our Family Office Pillars

- Wealth Management
- Investment Management
- Tax Planning
- Family Governance
- Family Enterprise Management
- Payroll & HR
- Family Office Administration
- Philanthropy
- Next Generation Education
- Legacy Planning



Planning For The Future...

A key part of our Family Office review process is helping families gain confidence that the people, structures and plans they have in place today will continue to support those they care about tomorrow.

Over the years we have found that the concerns keeping wealthy families awake at night are rarely investment related.

Instead, they tend to revolve around a small number of important questions:

- Who is coordinating everything?
- What happens if I die?
- Are my children prepared?
- Are my advisers working together?
- Is the family becoming more complex than the wealth?

As wealth grows, families often find themselves managing multiple advisers, Family Investment Companies, trusts, property portfolios, household employees, succession planning, tax planning and increasingly complex family dynamics.

What begins as successful wealth creation can gradually evolve into a family enterprise requiring coordination, structure and oversight. Most wealthy families therefore don't need another adviser. They need someone to coordinate them.

Lodge Family Quote

"Wealth rarely fails because of poor investments. It fails because families become more complex than the structures supporting them."

Coordinating Today.
Protecting Tomorrow.



WEALTH
MANAGEMENT



TAX &
STRUCTURING



GOVERNANCE &
SUCCESSION



FAMILY OFFICE
ADMINISTRATION



REPORTING &
OVERSIGHT

We act as your CFO/COO, bringing clarity, structure
and oversight to every aspect of your family enterprise.

Who We Work With...

Our Family Office service is designed for families whose financial lives have become increasingly complex.

Typically, this includes:

1

Business owners and entrepreneurs

2

Families with Family Investment Companies

3

Families with trust structures

4

Property-owning families

5

Multi-generational wealth

6

Families employing household staff

7

Preparing for a business sale or liquidity event

Many of our clients already have trusted solicitors, accountants and investment managers.

What they often lack is someone coordinating everything. That is where OCM Family Office adds value.

Built Through experience...

For more than 25 years, OCM has grown alongside the families we advise.

As our business grew, so did the complexity.

More decisions. More people depending on the right outcomes.

We learned first-hand that wealth brings opportunity, but it also brings administration, governance, succession challenges and the responsibility of preparing future generations.

The solutions we built for ourselves became the foundations of OCM Family Office.

Today we support more than 60 families with over £5 million of wealth and help oversee more than £800 million of assets under advice and influence.

Over the years we have helped families navigate business sales, succession planning, family investment companies, trusts, property portfolios, family governance and the transition of wealth across generations.



But numbers alone are not what define us.

What matters is that we understand the realities of managing family wealth because we do it for ourselves. We advise from experience as well as expertise.

And we share that experience with the families we serve every day.

**More Advisers.
More Structures.
More Responsibilities.**



FAMILY OFFICE FOR FAMILIES LIKE OURS

Most Family Offices are built by professionals...

OCM Family Office was built by a family.

Over the last quarter of a century, we have built our business, raised our family, navigated succession planning, managed growth and faced many of the same questions our clients ask themselves today.

- Who is coordinating everything?
- Are the right structures in place?
- Will the next generation be prepared?
- How do we preserve not just wealth, but harmony?

The systems, processes and relationships we have developed for our own family enterprise are the same foundations we make available to our clients.

That means families benefit from decades of real-world experience without having to create their own Family Office from scratch.

OCM Wealth Management Today...

OCM has been built from the ground up to provide the services that we, as a family of entrepreneurs, value and rely upon in our own lives. Our experience has shaped a business designed to help families navigate complexity with confidence, clarity and trusted support.

We are proud of what we have created, the relationships we have built, and the role we play in our local community. As OCM evolves and grows, our focus remains the same: delivering meaningful support that benefits families, businesses and communities.

OCM at a Glance

- Trading Since April 2004
- Independent Wealth Manager
- Tax Advisers
- Asset Management
- Employee Benefits
- In Excess of £850m of assets
- 650 Families advised and managed
- Team of over 40 professionals

OCM Family Office Today...

The experience we have gained building our own family enterprise has allowed us to support other families facing similar responsibilities.

Over the last three decades, families have trusted OCM to help them navigate succession, governance, family wealth, business ownership and intergenerational planning.

Today that experience is reflected in the scale and depth of our family office

- Senior Advisors having 30+ years Experience
- More than £175m of Net Assets under Influence from 13 Families
- Another 50 Families whose wealth is growing rapidly and needs more complex
- Multi-Generational Focus
- Stoically Independent and Personal

Lodge Family Quote

"We believe wealth should create freedom, not complexity. Wealthy Clients don't need the cost and complexity of building your own private Family Office to benefit from Family Office support. We built a Family Office to help manage our own family's growing responsibilities and today we share that experience with other families facing the same challenges."

Professional Expertise.
Personal Experience.
Shared With Families Like Ours.

Family Governance & Stewardship

Protecting more than wealth. **Protecting family unity.**

Payroll Services

- Family Constitutions
- Family Councils
- Governance Frameworks
- Family Meetings
- Succession Planning
- Family Charters
- Family Communication Structures
- Conflict Resolution Support
- Next Generation Education
- Family Legacy Planning

Many families successfully transfer wealth.
Far fewer successfully transfer responsibility, values and purpose.



Family Enterprise Management...

Managing the structures that support family wealth.

Services Include

- Family Investment Company Administration
- Corporate Governance
- Tax Planning
- Director Support
- Company Secretarial Services
- Board Meeting Coordination
- Shareholder Reporting
- Trustee Liaison
- Compliance Oversight
- Family Enterprise Reporting
- Strategic Reviews

We become the operational hub for the family's business and investment structures.

Family Office Operations

Your Family Office COO. Our team coordinates the day-to-day management of family affairs.

Services Include

- Banking Coordination
- Bill Payment Services
- Cashflow Management
- Family Office Accounting
- Financial Reporting
- Insurance Reviews
- Property Administration
- Asset Registers
- Document Management
- Digital Record Keeping
- Supplier Management



Payroll & Human Capital Management

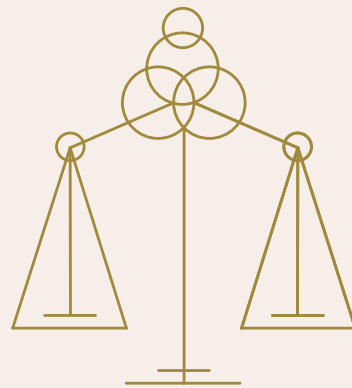
Supporting the people who support your family.

Payroll Services

- Company Payroll
- Household Payroll
- PAYE & Pension Administration
- Benefits Administration
- Auto Enrolment Compliance

HR Services

- Recruitment Support
- Employment Contracts
- Staff Handbooks
- Performance Management
- Employment Law Support
- Succession Planning
- Staff Retention Programmes



Lodge Family Quote

“The aim is to deliver the clients’ required outcome and protect capital, with asset split depending on our perception of asset and portfolio volatility and the clients’ acceptance of it.”



Integrated Wealth & Tax Management

Wealth Management

- Strategic Financial Planning
- Investment Management
- Retirement Planning
- Cashflow Planning

Tax Planning

- Income Tax
- Capital Gains Tax
- Inheritance Tax
- Family Investment Companies
- Trust Planning
- Pension Strategies
- Intergenerational Planning

Professional Adviser Coordination

One Family. One Strategy. One Point of Contact.

We coordinate:

- Solicitors
- Accountants
- Trustees
- Tax Advisers
- Investment Managers
- Corporate Finance Advisers
- Banking Partners
- Insurance Specialists
- Investment Managers
- Corporate Finance Advisers

The result is a joined-up strategy and a single trusted relationship.



Legacy, Philanthropy and Next Generation Planning

Preparing future custodians of family wealth.

Services Include

- Family Philanthropy
- Charitable Foundations
- Impact Investing
- Wealth Education
- Trustee Education
- Governance Education
- Entrepreneurial
- Development
- Family Legacy Planning



A successful Family Office is not simply about preserving assets.
It is about preparing future generations to become responsible stewards.

A photograph of a family of five walking along a path in a park. The path is covered with fallen autumn leaves. The family consists of two women, two men, and a young girl. They are all dressed in warm clothing like coats and scarves, suggesting a cool day. The background shows trees with yellow and orange autumn leaves, and a soft, hazy light. The overall mood is peaceful and happy.

Built Through experience...

Managing a Property Empire

A family with a substantial property portfolio and multiple ownership structures required greater visibility, reporting and coordination.

OCM provided consolidated oversight, administration support and strategic governance across the family's affairs. The result was improved control, reduced complexity and greater confidence in the management of family wealth.

Selling a Family Business

The sale created wealth. It also created complexity. Multiple advisers, tax considerations, family governance and future planning all needed coordinating.

OCM became the family's central point of oversight, helping transform a successful business exit into a long-term family strategy.

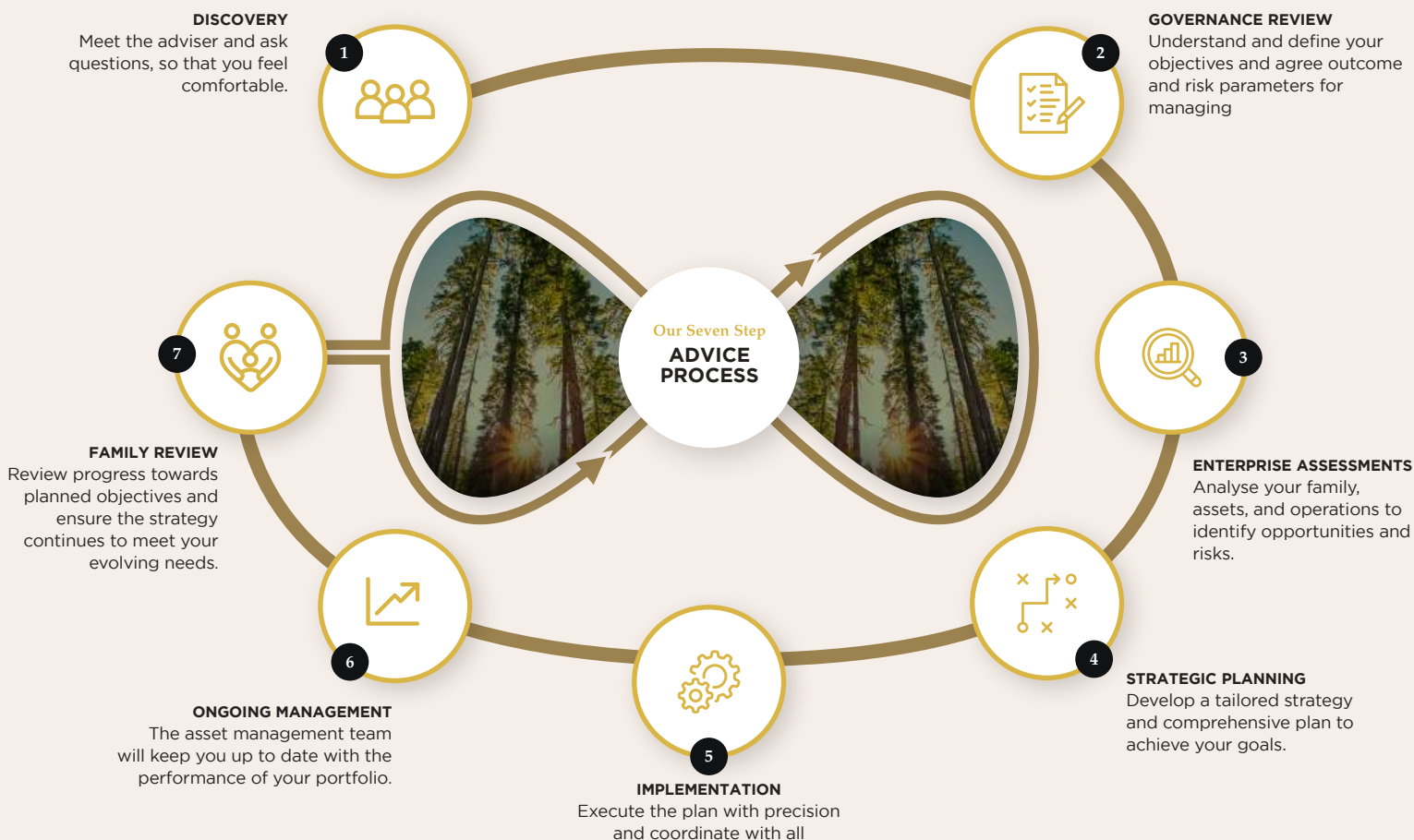
Preparing the Next Generation

As wealth transitioned between generations, the family wanted to ensure future beneficiaries were prepared for the responsibilities that accompanied it.

OCM introduced governance structures, family meetings and educational support to help develop long-term stewardship. The result was stronger communication, clearer succession planning and a shared vision for the future.

THE OCM PROCESS?

A structured approach is essential for a successful family office.
Our process aligns goals and supports long-term success.



Family office in action...

If you are kept awake by the question posed earlier, then please contact us for a free confidential review designed to identify opportunities to improve:

- 1 Governance
- 2 Succession Readiness
- 3 Adviser Coordination
- 4 Family Enterprise Structures
- 5 Legacy Planning
- 6 Long-term Stewardship

Lodge Family Quote

“Wealth should create freedom, not complexity. We do this every day for ourselves and our clients. Helping families remove the burden of coordination, administration and oversight, allowing them to spend less time worrying about the responsibilities of wealth and more time enjoying the opportunities it provides.”



Managing Wealth is Important.

Managing the Family Enterprise
is Essential...

Get In Touch

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