



## HIGH NET WORTH SERVICES

Morrays works with high-net-worth families and their advisory teams to provide services critical to the Client in the following areas:

- |                            |                              |
|----------------------------|------------------------------|
| <b>Tax planning</b>        | <b>Asset management</b>      |
| <b>Estate planning</b>     | <b>Liquidity events</b>      |
| <b>Philanthropy</b>        | <b>Risk management</b>       |
| <b>Retirement planning</b> | <b>Compliance</b>            |
| <b>Trust Planning</b>      | <b>Estate administration</b> |
| <b>Financing</b>           | <b>Post-mortem planning</b>  |
| <b>Investment planning</b> | <b>Business Services</b>     |

Morrays can coordinate with clients' advisory teams to form a family office. Morrays provides Business Services to high-net-worth families. Additional support can be added as required such as:

- **Access to global family office providers**
- **User-friendly platforms**
- **Experts in artwork and luxury items**
- **Commercial investment opportunities**

## Howard Morry's Profile

Howard Morry is the Executive Chair of Morrys. He is recognized for his expertise, experience, and integrity by a number of rating agencies, including Who's Who in the World, LexisNexis Martindale-Hubbell, and Best Lawyers.

Howard is also a published author and has chaired and spoken at numerous conferences over the years. He has also served on the Boards of a number of groups, including the Canadian Tax Foundation and the Canadian Council for Aboriginal Business.

Howard is a Governor of Ben Gurion University of the Negev in Israel and has been awarded the Queen Elizabeth II Diamond Jubilee Medal for his service to Canada.



## Morry's Team

Morrys provides legal services through Howard Morry Law Corporation and global strategic services through Howard Morry Strategic Counsel.

In addition to Howard Morry's personal expertise and experience, Howard Morry Strategic Counsel can also make available to clients:

- **In-house project managers**
- **An extensive global network of service providers, and**
- **Customized technology solutions**

Morrys' clients are expected to continue to retain external lawyers, who will work with Howard Morry Law Corporation on legal matters as needed. Clients will also continue to retain other expertise as needed, e.g., accounting, banking, and investment.



## MORRYS FEES

Morrys can bundle all its services in a monthly fee that reflects time, effort, and value. Morrys also charges an additional fee for projects, i.e., a time-limited set of activities intended to achieve a particular aim.

Most clients of Morrys have both a bundled monthly fee and project fees for listed projects undertaken from time to time. Once agreed to, Morrys' fees are listed in a schedule signed by both Morrys and clients.

Please contact Morrys for a confidential conversation.

# MORRYS