

Redefining
Family Office
Solutions



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Rooted in heritage, Finrath is a name drawn from the Gaelic language words
‘fine’ - meaning family, and ‘rath’ - meaning success or prosperity.
Combined, they form an enduring and multi-generation expression of purpose:

The pursuit of success through the strength of family.

What we Offer

Founded by three former British Army Officers with extensive family and private office experience, Finrath & Co. helps individuals and families manage the complexity of modern private life with discretion, clarity, and trusted execution.

Bridging the gap between MFOs and Concierge

Through a flexible, value-driven hybrid operating model, we help clients retain their essential financial and investment functions in-house whilst outsourcing lifestyle and family services and solutions through our agile framework; maximising value and ensuring delivery where it matters most.

At Finrath, we recognise that today's family offices face a new reality: rising complexity, global wealth flows, rapid technological change, and shifting political landscapes. We bridge the space between traditional Multi-Family Offices and reactive concierge services, offering an agile, pragmatic, and accountable approach that puts long-term solutions first.

Flexible,
Aggregated,
Outsourced

Clients benefit from high-touch personal support and seamless access to specialist expertise, all coordinated by a single proven and trusted team. We deliver solutions across private, estate, and lifestyle functions, from advisory to fractional Chief of Staff support functions, extending capability through our curated network of international partners and experts.

Simplifying the Complex. Trusted, Safe, Discreet

Our ethos is built on trust, agility, and discretion, qualities shaped by leadership in both demanding military and international private office environments. Acting as a strategic extension of our clients, we combine operational oversight with leadership and hands-on delivery to ensure every initiative achieves tangible results.

Whether coordinating multi-jurisdictional estates, supporting governance and multi-generational priorities, or managing complex family and life scenarios, Finrath delivers the structure and reliability of an institutional platform, executed with the precision, empathy and discretion of a private office.



“We remain personally committed to every aspect of a project and relationship, from early liaison and understanding the issues through to delivering solutions”.

Finrath & Co. Founders:
Max, Charlie & Ed

Services & Solutions

We provide discreet, high-trust support across the full spectrum of personal and private life situations and structures. Guided by precision and experience, and shaped by extensive family office experience, we simplify complexity to ensure a Principal's private world runs with structure and efficiency.

Property, Assets & People:

- Comprehensive management of property, estate, and personal assets.
- Oversight of acquisitions, development projects, and refurbishments.
- Coordination and administration of private offices and household staff.
- Protection and enhancement of long-term asset value.
- Discreet, hands-on support ensuring smooth daily operations across all holdings.

Security & Logistics:

- End-to-end management of physical, digital, and reputational security.
- Coordination of complex global travel, event, and relocation logistics.
- Expertise in crisis response and continuity planning.
- Discreet support across protection, media, and household operations.
- Calm, reliable infrastructure ensuring safety and seamless mobility worldwide.

Private Client Solutions:

- Bespoke support for confidential and high-sensitivity projects.
- Expertise in philanthropy, legacy planning, and dispute mediation.
- Coordination of health, wellbeing, and longevity programmes.
- Trusted oversight across medical, recovery, and personal advisory matters.
- Every engagement delivered with precision, discretion, and integrity.

Case Studies

At Finrath & Co. we believe the best way to understand our value is through the results we deliver. Our case studies provide a window into how we have supported clients across a range of diverse scenarios, often in highly complex or sensitive circumstances.

Each example highlights the practical solutions we have brought to families, family offices, individuals and private offices, illustrating how we manage challenges, unlock opportunities, and ensure seamless execution.

Strategic Philanthropic Support



Background: Our client operated at the intersection of finance, politics, philanthropy, and elite networking. Managing such a portfolio demanded discretion, precision, and flawless execution. Finrath & Co. provided strategic and operational support to sustain the Principal's influence, expand their reach, and maximise philanthropic impact.

Objectives: The Principal sought sophisticated representation in political, Royal, economic, and industry circles, while expanding their global network and visibility. They also required expert curation of elite events aligned with both professional and philanthropic goals.

Our Approach & Impact: We acted as a trusted representative, liaising with senior stakeholders, think tanks, and global decision-makers and provided tailored research to inform trading and geopolitical insights. These efforts put in place lasting relationships across various sectors. Within 12 months, we increased the Principal's strategic network by over 200%, driving engagement through introductions, events, and partnerships that strengthened both business and philanthropic influence.

We managed a £4M annual foundation programme, overseeing more than 100 monthly funding applications and ensuring accountability across 80+ charitable organisations. This rigorous approach maintained alignment with the Principal's giving philosophy and delivered measurable impact and operational structure.

To reinforce their presence, we curated and managed multiple exclusive events each month, positioning the Principal as a thought leader and influencer, whilst leveraging events to unlock partnerships and elevate reputations.

Results: Through agile, high-level private office operations, we enhanced the Principal's visibility, influence, and charitable impact. Strategic coordination and hands-on execution embedded their values into every initiative and provided the desired personal and professional outcome.

Ideal For: This approach is ideal for Principals seeking strategic, philanthropic, and public engagement support as well as representation in political or global forums by developing, scaling and professionalising their philanthropic output.



Estate Management & Property Solutions



Background: As Estate Director for an international Head of State, our responsibility was to establish and manage a newly acquired private mixed-use estate in France. The estate and properties functioned both as an equine training centre and as a diplomatic hub. With no framework in place, we built the operation from the ground-up, embedding structure, leadership and governance and establishing a high-performance, results driven culture.

Objectives: The aim was to create an estate capable of supporting elite equestrian competition and high-level diplomatic engagement . We were tasked with assembling and leading a large team, ensuring service delivery across all functions, embedding financial controls, and positioning the estate as a platform for cultural diplomacy and international relations.

Our Approach & Impact: We recruited and managed a team of 50 across seven departments (security, kitchen, housekeeping, gardens, maintenance, equine, and administration), ensuring every function worked in harmony. The 250-acre estate encompassed race tracks, paddocks, and two stable yards housing 150 horses, all maintained to international competition standards.

Alongside operations, we acted as a trusted liaison in diplomatic contexts by hosting equestrian and diplomatic events designed to strengthen political and economic ties. In this role, we briefed senior leaders, engaged directly with visiting delegations, and served within a Private Secretary capacity during official visits.

Operational excellence was matched by rigorous governance. We implemented financial controls to manage an annual expenditure of €10 million, delivered accurate forecasts, and optimised spending without compromising on service or security. We also handled sensitive correspondence, from sponsorship requests to VIP coordination, ensuring the estate's reputation remained impeccable.

Results: Under our leadership, the estate was transformed into a professional, efficient, and trusted private office, serving the needs of a high-profile family. It became a showcase venue for equestrian excellence and a discreet platform for diplomacy, balancing operational rigor with cultural sensitivity. This dual role enhanced both the family's international profile and the Principal's broader soft power strategy.

Ideal For: Leaders, principals, and families requiring a professionalised estate operation that combines world-class property and staff management with discretion, diplomacy, and cultural engagement.



Super-Prime Property & Security Project



A super-prime property in the South of France required hands-on support with contractors, service providers, and local authorities. We also unblocked a delayed security project, strengthened policies, and advised on staffing, costs, and operations.

Acting on-site for the Principal's family, we expedited stalled projects, delivered a forecast of future challenges, and introduced a new operations model as well as achieving cost savings, a stable management framework, and lasting efficiencies.



Chief of Staff Support to International Family



An international family with multiple UK properties and business interests required Chief of Staff support to manage their European assets. The role spanned HR, finance, and logistics, with oversight of six specialist teams and three properties. We also directed major renovation projects, delivering on time and within budget. Private Office operations were professionalised, streamlined, and aligned to lifestyle and strategic goals.

Alongside operations, we advised on smooth generational transitions within the Family Office, supporting both staff continuity and the family through changes in circumstance.



Security, Risk & Assurance



A private office engaged us to enhance safety for a politically exposed family with frequent international travel and high-profile engagements, where discretion and independence were paramount. The goal was a security framework balancing risk with the family's values of freedom and privacy.

Working with a leading consultancy, we delivered tailored risk assessments, threat mapping, and scenario planning, culminating in a discreet close protection team. Journey management, covering pre-travel checks, secure transport, and real-time monitoring was central.

The integrated solution, coordinated through us, safeguarded staff, assets, and operations while giving the Principal peace of mind.

About Us

We are a team of three former British Army Officers with over six-decades of combined experience across demanding leadership roles in the military, international Family Offices, Private Office, diplomacy and Private Client Services.

United by a shared sense of service and loyalty, underpinned by a military foundation of trust, discipline, and execution, we each bring a distinct set of capabilities shaped by diverse career paths across Europe, the GCC, and the US.

Charlie Dalziel



Charlie's career blends leadership, trust, and operational delivery across military command and senior, international Family Office roles. A former Infantry and Intelligence Officer, he served in conflict zones and high-profile assignments, developing decisive leadership and mission-focused execution.

Transitioning to private service, he has held Chief of Staff and Director roles in Single Family Offices, overseeing estates, staffing, security, and logistics. With over a decade living in the Middle East, fluent in French, Italian with advanced Arabic and Spanish, Charlie brings discretion, cultural fluency, and global perspective to meet diverse challenges.

Max Dooher



Max's career is defined by structure, trust, and quiet effectiveness. A former British Army officer with ceremonial and operational experience in Somalia, Afghanistan, and senior aide roles, he brings leadership, precision, and strategic insight to Family Office management.

Max has designed and led international offices, overseeing assets, legal frameworks, and high-performance teams with discretion and integrity. Known for translating complex visions into reliable systems, he operates across Europe, the US, and Asia with calm authority and a focus on long-term results.

Edward Plunkett



Ed combines military leadership, international diplomacy, and high-profile Family Office management with a personable, trust-driven approach. A former British Army officer serving in Iraq and Afghanistan, he honed a decisive leadership style under challenging scenarios.

On moving to private service, he managed diverse European estates, diplomatic portfolios, and complex family operations, bringing discretion, cultural fluency, and operational precision. Known for building enduring relationships, Ed blends commercial insight with interpersonal skill, delivering legacy, efficiency, and long-term value.



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