★ Trusted Multi-Family Office Since 2009

$500M+
ASSETS UNDER ADVISORY

Your Personal CFO for Generational Wealth

15+
YEARS OF EXCELLENCE

We provide clarity, strategic perspective, and long-term confidence in managing your family's capital—ensuring wealth thrives across generations.

Schedule Consultation → | Explore Services

Independent & Conflict-Free · Fee-Only Advisory · 50+ Families Served

SCROLL TO EXPLORE

15+	$500M+	100+	98%
YEARS EXPERIENCE	ASSETS ADVISED	FAMILIES SERVED	CLIENT RETENTION

ABOUT FWA

A Different Approach to Wealth Management

Family Wealth Advisors operates as an independent, fee-only multi-family office. We have no products to sell, no commissions to earn, and no conflicts of interest.

Our sole obligation is to you and your family. We serve as your personal CFO—coordinating all aspects of your financial life with the same care and diligence as if it were our own.

- 100% Independent Advice
- Fee-Only Structure
- Generational Planning

Learn More About Us

2009
Established in Herzliya

WHAT WE DO

Comprehensive Family Office Services

A custom framework of services tailored to your specific needs, objectives, and family circumstances.

Strategic Wealth Planning

Comprehensive strategies for protecting, growing, and transferring your family's wealth across multiple generations with clear milestones.

Learn more →

Investment Management

Evidence-based portfolio management with access to institutional-quality investments, global diversification, and disciplined rebalancing.

Learn more →

Tax Optimization

Strategic tax planning across jurisdictions to minimize liabilities, maximize after-tax returns, and ensure full regulatory compliance.

Learn more →

Estate & Legacy Planning

Comprehensive legacy preservation including trusts, succession planning, philanthropic giving, and seamless wealth transfer to heirs.

Learn more →

Family Governance

Establishing family constitutions, governance structures, and next-generation education programs to ensure unified decision-making.

Learn more →

Risk Management

Comprehensive protection strategies including insurance analysis, liability structuring, and portfolio stress testing for volatility.

Learn more →

OUR APPROACH

Investment Philosophy

Three evidence-based principles that have withstood the test of time and guide every decision we make.

01 **Evidence Over Speculation**

We build portfolios based on decades of empirical financial research—not headlines or market predictions. Our strategies are designed to capture long-term global growth through disciplined, systematic investing rather than attempting to time the market.

02 **Strategic Risk Balance**

Risk is not to be avoided, but understood and managed strategically. We identify risks that offer expected returns and diversify away those that don't—balancing your family's need for liquidity with the pursuit of sustainable growth.

03 **Behavioral Discipline**

The greatest threat to long-term wealth is emotional reaction to short-term volatility. We serve as your behavioral anchor—providing the discipline and perspective necessary to stay the course during turbulent markets.

INVESTMENT CALCULATOR

See Your Wealth Grow

Use our interactive calculator to visualize how disciplined, long-term investing can help your family's wealth compound over time. Adjust the parameters to match your situation.

- Based on historical market returns
- Accounts for annual contributions
- Compound growth visualization

Initial Investment $1M

Annual Contribution $100,000

Investment Period 20 years

Expected Annual Return 7%

PROJECTED PORTFOLIO VALUE

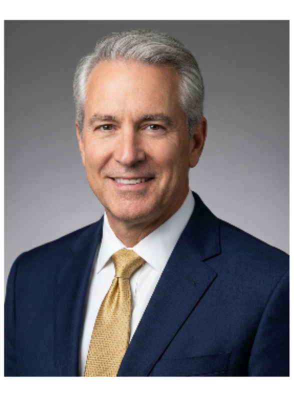
$7,969,234

Total contributions: $3,000,000 • Growth: +$4,969,234

LEADERSHIP

Meet the Team

Our experienced professionals combine decades of expertise in global financial markets with a genuine commitment to your family's success.



Daniel Peretz
Founder & CEO

Gil Ben Zadok, Adv.
Investment Executive

Gilbert Penhasi
Chief Operating Officer

Benjamin Sarkisov
Investment Manager

View Full Team

"FWA has been instrumental in organizing our family's complex financial situation. Their holistic approach and genuine care for our long-term success gave us peace of mind we never had before."

THE GOLDSTEIN FAMILY
CLIENT SINCE 2012 • TEL AVIV

QUESTIONS

Frequently Asked

What is a multi-family office and how is it different from a bank? ×

A multi-family office is an independent wealth management firm that serves multiple affluent families. Unlike banks, we have no products to sell and receive no commissions—our only obligation is to you. We provide comprehensive services including investment management, tax planning, estate structuring, and family governance, all coordinated under one roof with your interests as our sole priority.

What is the minimum investment to work with FWA? +

How do you charge for your services? +

Can you help with international assets and cross-border planning? +

How often will we communicate and review our portfolio? +

GET STARTED

Begin a Confidential Conversation

Ready to explore how a dedicated family office can transform your financial life? Contact us to schedule a confidential, no-obligation consultation.

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EMAIL
office@fwa.co.il

FIRST NAME | LAST NAME

EMAIL ADDRESS

PHONE NUMBER

INVESTABLE ASSETS
Select range...

HOW CAN WE HELP?
Tell us about your goals and current situation...

Request Consultation