

IN THE SUPREME COURT OF THE STATE OF ARIZONA

In the Matter of:)
)
ALTERNATIVE BUSINESS) Administrative Order
STRUCTURE APPLICATION OF) No. 2023 - 70
HERITAGE FAMILY OFFICES LLP)
)
)
)
_____)

Pursuant to ACJA § 7-209(E), the Committee on Alternative Business Structures, upon completion of its review of an application to be licensed as an Alternative Business Structure, is to submit to the Supreme Court a recommendation concerning whether to license the applicant. On April 11, 2023, the Committee completed its review and voted to recommend licensure of Heritage Family Offices LLP with the following condition:

- (i) Heritage Family Offices LLP’s Compliance Lawyer shall conduct semi-annual audits to review the firm’s compliance with Arizona Supreme Court Rule 33.1, ACJA § 7-209 and its internal policies and procedures and, at the completion of each audit, prepare and retain a written report of the findings. Therefore,

IT IS ORDERED approving Heritage Family Offices LLP as an Alternative Business Structure (ABS) in Arizona.

Dated this 18th day of April, 2023.

FOR THE COURT:

ROBERT BRUTINEL
Chief Justice