



OMNIA
FAMILY WEALTH

Global Access. Generational Impact.

At Omnia Family Wealth, we offer families access to some of the most compelling private investment opportunities from around the world, leveraging cutting-edge technology and institutional infrastructure to identify, evaluate and build portfolios designed to help you and future generations thrive.

Omnia Family Wealth: Partnering with families across generations.

OmniaWealth.com

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Where Process Meets Purpose



Michael Wagner
Co-Founder and COO
Omnia Family Wealth



Omnia Family Wealth is an independent multi-family office based in Aventura, Florida, founded in 2015 to serve ultra-high-net-worth families with deep, multigenerational relationships. We provide comprehensive wealth management services that include customized portfolio design, access to institutional-quality alternative investments, estate and tax planning and business succession planning.

As of December 31, 2024, we managed and advised on approximately \$2.79B in total assets. Our investment philosophy emphasizes risk-aware, long-term global diversification. We apply an institutional framework to sourcing and evaluating managers, particularly in alternative strategies, so every holding plays a defined role. Above all, approach every client relationship with clear purpose, open dialogue and a commitment that spans generations.

How do you intend to remain on the front foot and continue to set a high standard?

At the end of the day, our goal is simple: to provide a better experience for the families we serve. That focus motivates how we communicate, invest and evolve. Over the past year, we've taken meaningful steps by enhancing our technology and investment capabilities to better serve the families we work with.

We're applying machine learning to improve the speed and accuracy of private asset reporting, historically a pain point for families with complex portfolios.

On the investment side, we're building on the success of our Low Beta Fund by exploring which other asset classes could benefit from the same intentional, repeatable approach.

Our goal is to continue offering access to top-tier opportunities in a deliberate, transparent and sustainable manner.

In what ways were you able to deal with challenges and problems this time around? What lessons have you learned?

Recent market volatility wasn't so much a portfolio challenge as it was an opportunity for effective communication. It allowed us to revisit and reinforce the core principles we build every portfolio around: clarity, discipline and resilience.

Our role goes beyond capturing returns in favorable markets. It's about helping families stay prepared through the full cycle and offering perspective when conditions shift, which has proven to be just as valuable as any investment decision.

Whom do you look to, either inside or outside your business, for ideas and inspiration?

We're constantly inspired by the families we work with. One of the greatest privileges of this business is sitting across the table from people who've built and led remarkable businesses, each with a unique story.

Their perspectives challenge us to think more creatively and lead with purpose, not just in how we invest, but in how we support legacy, stewardship and long-term planning. That exposure keeps our team energized and always learning.

What will winning this award do for your business and colleagues?

We're honored to be recognized as this year's winner in the Alternative Asset Manager category. The team worked incredibly hard to create a differentiated solution for our clients, and we've long believed it represented a best-in-class offering. This award validates that belief.

For our clients, this is further evidence that we're continuing to grow in the right ways and earning recognition not only from them but also from the broader industry.