

Help your family secure its financial future

# FAMILY OFFICE SERVICES



# THE IMPORTANCE OF A FAMILY OFFICE

Ultra high net worth families experience unique and complex challenges, which if not addressed can impact your family's wealth, happiness, and legacy.

Many families consider a family office as a way to meet their financial needs, provide greater control over their wealth, and handle their affairs. Since every family has its own unique set of requirements, there are many types of family office structures.

Some provide basic administrative support, while others oversee investment management and coordinate all of the family's financial and lifestyle needs.

Family offices are built to address interconnected decisions and challenges like:

- Organizing and managing family assets in an efficient manner
- Keeping up with tax and regulatory environments throughout the world
- Improving and managing family cohesion and generational transition
- Developing a comprehensive succession plan to align the family's wealth

Once the family office is established, it is likely to serve multiple generations, across which there may be a range of different needs that require various wealth management strategies. A well-run family office successfully integrates these strategies to directly support the goals of the family as a whole.



## SERVING THE UNIQUE NEEDS OF YOUR FAMILY



# OUR APPROACH

Each family office is positioned at the center of the owners, families, and the businesses and investments they own. Family office leaders support the family's vision and legacy, leadership, ownership, and wealth transition decisions with a focus on protection, improvement, and growth.

## WEALTH MANAGEMENT

- Asset allocation construction
- Bill payment
- Investment policy development
- Portfolio management
- Private & alternative investments
- Philanthropic guidance
- Risk analysis & management

## ACCOUNTING

- Bank account reconciliation and monitoring of activity
- Data & system clean up
- Investment accounting
- Outsourced accounting & controller functionality
- Process design & automation
- Regular financial statements
- Software set up & implementation

## TECHNOLOGY RISK

- Cybersecurity check-up
- Interim & fractional CIO / CISO
- IT due diligence consulting
- IT internal audits
- IT risk assessments

## TAX

- Strategic planning focused on income tax optimization
- Design and implement asset protection
- Estate and multi-generational succession planning
- Cash flow income tax planning
- Domestic and international tax compliance

## ADVISORY

- Business valuations
- Buyer / seller representation & support
- Due diligence
- Fraud & forensic accounting
- M&A transaction advisory
- Quality of earnings
- Succession planning



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