



FAMILY OFFICE SERVICES

<ul style="list-style-type: none"> ➤ Financial Affairs Organization ○ Cash Management ○ Bill Pay, Payroll & Administrative Support ○ Operating Company Liaison ○ Corporate Structuring ○ Trust Structuring & Administration ○ Entity Agreements, Titles, Closings & Ownership Documentation ○ Advisor-Team Coordination & Management ○ Collectibles Inventory & Appraisal 	<ul style="list-style-type: none"> ➤ Comprehensive Financial Reporting ○ Periodic Consolidated Reporting ○ Balance Sheet Analysis ○ Cash Flow Use & Source Analysis ○ Investment Performance Reviews & Analysis ○ Entity Accounting & Reporting ○ Valuation of Assets & Recordkeeping ○ Liquidity Analysis 	<ul style="list-style-type: none"> ➤ Tax & Estate ○ Tax Planning – Domestic, International, Wealth & Estate ○ Tax filing ○ Trust, Corporate & Individual Tax Compliance ○ Estate Management
<ul style="list-style-type: none"> ➤ Risk Assessment & Management ○ Insurance Assessments ○ Cyber and Physical Security ○ Due Diligence Services ○ Liability Audits ○ Financial Controls ○ Fraud Protection ○ Entity Structuring ○ Health Directives, Power of Attorney, Guardianship 	<ul style="list-style-type: none"> ➤ Strategic Services ○ Wills & Other Legal Documents ○ Succession Planning & Financial Education ○ Trust & Trustee Services ○ Family Council, Assembly & Mediation ○ Family Constitutions ○ Confidential Intervention Support ○ Personalized Concierge Services 	<ul style="list-style-type: none"> ➤ Philanthropy ○ Private Foundation Administration ○ Charitable Giving Coordination ○ Outreach ○ Diligence & Reporting