

Family Office Services



Strategic Planning

- Identify concerns
- Articulate goals
- Determine benchmarks
- Develop plan

Cash Flow

- Forecast income and expenditures including taxes
- Manage payments and collection *
- Structure credit

Investment Portfolio

- Develop investment policy
- Establish and maintain portfolio allocation/custody
- Identify specific investments:
 - Strategic asset allocation
 - Cash management
 - Taxable and municipal bond management
 - Public equity
 - Private equity
 - Real estate
 - Alternative investment strategies
- Report performance

Tax Management

- Plan and coordinate income, gift compliance
- Model tax impact of decisions

Risk Management

- Identify risk reduction opportunities
- Hedging, monetization or disposition of financial assets
 - Property/casualty
 - Excess liability
 - Premature death
 - Disability
 - Health
 - Long term care

Estate Planning

- Wealth transfer planning
- Coordinate the design of a gifting and estate plan
- Manage charitable giving
- Assist with probate management *

Special Projects

- Negotiate significant purchases or sales *
- Family enterprise planning
- Other needs addressed case-by-case basis *