

Family Office

- Financial and investment education with members of the family office
- Facilitate regular meetings with your other professionals, i.e. Lawyer, Account and CFO, as needed
- Monitor progress of deliverables both pre and post meeting and track action items progress to completion

Family Governance and Financial Literacy

- Educate individual family members on financial literacy, as needed
- Work with next generation on understanding personal spending and budgeting, tax implications, understanding different investment vehicles, and building their own financial plan
- Facilitate conversation between current and next generation around money, wealth planning and wealth transfer
- Longevity planning

Wealth Management

- Develop financial planning strategies
- Provide relevant and **impactful** tax planning guidance and strategies
- Assess cash flow requirements
- Evaluate investment opportunities, as requested

Financial Planning

- Review and prioritize goals and objectives of current financial situation, including a net-worth statement, cash-flow summary, and budget/income-tax analysis
- Develop a financial management strategy, including financial projections and tax analysis
- Develop an asset management strategy
- Manage and monitor the implementation and progress of your financial plan
- Lifestyle assessment and planning - including discussing and evaluating major buy/sell decisions

Tax Planning

- Identify and implement tax-planning strategies to optimize your financial position
- Provide relevant tax planning guidance and strategies
- Analyze tax distribution strategies and facilitate discussions with your other professionals, as needed
- Liquidity event and pre-transaction planning
- Discuss and coordinate any tax matters with CPA or appropriate tax professionals

Insurance Planning

- Assess potential exposure to financial liability and develop a comprehensive risk-management plan
- Review and develop life insurance management plan in line with financial plan
- Facilitate property & casualty insurance reviews with other professionals, as needed
- Address long term-care needs and present relevant solutions
- Identifying fundamental asset protection strategies

Estate Planning

- Assess estate net-worth and liquidity, and developing an estate plan to ensure objectives are met
- Review, identify, and implement gifting strategies
- Discuss multigenerational estate planning strategies and collaborate with other professionals to achieve estate plan goals
- Review philanthropic giving and recommend charitable giving strategies, as needed and/or recommended by financial plan

Business Planning

- Develop, implement, and review business succession plans
- Assist in valuation development
- Assess business insurance and disability protection options
- Develop executive execution package and provide educational workshops
- Evaluate exit plans and opportunities