FAMILY OFFICE

Overview

Rely on experienced staff to manage your family finances like a business

The term "family office" once described dedicated, specialized financial care available only to the world's wealthiest families. Today, a high level of service is available to a wider audience, including our clients. In this modern model, the family office acts as a family CFO, consolidating a variety of financial functions and relieving the family of many tasks – from routine to complex.

Our fundamental philosophy behind family office services is that most financial tasks are best managed by experienced professionals working together to meet the family's goals. This helps ensure functions are completed properly and on schedule, while clients are free to concentrate on career, family life, retirement, and so on.

While every family office arrangement is unique, our services may include:

- Investment management
- Insurance coordination
- Bill paying
- Tax planning and preparation
- Real estate and other transactions
- Vetting and oversight of service providers
- Managing properties or staff
- Coordinating charitable contributions and affiliations

Would your family benefit from centralized management of key financial aspects of your life? We would be happy to discuss options for providing family office services tailored to your needs and lifestyle.