



WilkinGuttenplan

CPAs & Advisors

FAMILY OFFICE SERVICES

At WilkinGuttenplan, we offer a full suite of services for you and your family that will help eliminate time-consuming day-to-day tasks, tailored to address both your personal and professional financial needs. Our team of experts, the Family Office Services (FOS) practice group, will partner with clients to provide services in the areas of financial management, planning, strategy, and execution.

Our FOS group also understands the diverse needs unique to each individual and family, and therefore offers a personalized approach, giving you peace of mind that your “family office” is in good hands. The value and benefits to our clients that our team of experienced professionals and specialists have made us ready to address the myriad “back office” needs of your family.

SERVICE OFFERINGS

Financial Management

- Bill paying
- Bank reconciliations
- Cash management
- Monthly/quarterly reporting
- Budgets
- Payroll administration
- Bookkeeping

Planning, Strategy and Execution

- Individual and business tax planning and compliance
- Estate and trust tax planning and compliance
- Donor advised fund/private foundation management
- Concierge services

Benefits to our Clients

- Application of industry recommended tools for bill paying, providing the family with an easily accessible audit trail for all transactions
- Improved visibility and organization of overall expenses, leading to potential cost-saving measures
- Minimize overall family tax liabilities by identifying potentially missed tax deductions
- Reduction in IRS/state penalties and interest charges by avoiding late filing and/or late tax payments
- Increased efficiencies with preparation of tax returns
- Secure and safe documentation storage