

# SERVICES

## FAMILY OFFICE SERVICES



WilkinGuttenplan's Family Office Services (FOS) practice group recognizes the importance of your financial well-being as well as the value of your time. With a full suite of services and a personalized approach, tailored to address both your personal and professional financial needs, our FOS group will give you peace of mind that your "family office" is in good hands.



### ✓ 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
- Trust and Estate tax planning and compliance
- Donor-advised fund/private foundation management
- Concierge services

### BENEFITS TO OUR CLIENTS INCLUDE:

- 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
- Minimization of 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

Our professionals understand the diverse needs unique to each individual and family, and therefore customize our services accordingly. Our team of experienced professionals and specialists is ready to address the myriad "back office" needs of your family.