



FAMILY OFFICE SERVICES

Providing a Comprehensive Solution
to High Net Worth Clients

Alvarez & Marsal's Family Office Services is dedicated to helping clients successfully manage wealth and plan for the future by acting as the family CFO overseeing all aspects of personal and business interests. Our priority is to work with clients to achieve their long-term goals and deliver highly personalized solutions that suit our client's unique needs.

→ We serve as advisor, advocate, teammate and partner, maintaining the anonymity and trusted support that families desire.

Our services include:



Financial Reporting & Accounting

→ Your family deserves personalized financial reporting and accounting services to help achieve your goals.

As your family CFO, our team will:

- Act as the central point of contact between investment advisors, attorneys, tax team, insurance providers, and family support staff
- Provide accounting services to family-owned businesses and foundations and perform entity reporting to comply with requirements of trust and estate documents
- Prepare personal financial statements to consolidate all investment holdings, liabilities, and net worth
- Prepare an annual budget of expenses and analyze the budget to actual activity

Protecting & Organizing Family Assets

→ Managing risk and producing comprehensive financial reporting is an integral part of planning for your family's future.

As your trusted advisor, our team will:

- Focus on asset protection and estate planning to ensure alignment with our clients' long-term objectives
- Minimize cybersecurity risks by implementing best practices to secure personal data
- Perform annual insurance review of the home, auto and collections
- Assist with special projects including large asset purchases and insurance claims
- Support bill payment by contacting vendors and providing overall administrative support
- Provide concierge and administrative services such as research on special projects

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ABOUT ALVAREZ & MARSAL TAX

Alvarez & Marsal Tax, part of Alvarez & Marsal (A&M), a leading global professional services firm, is an independent tax group made up of experienced tax professionals dedicated to providing customized tax advice to clients and investors across a broad range of industries. Its professionals extend A&M's commitment to offering clients a choice in advisors who are free from audit-based conflicts of interest, and bring an unyielding commitment to delivering responsive client service. A&M Tax has global presence in major metropolitan markets throughout the Americas, EMEA, and APAC.

Alvarez & Marsal Tax is a founder of Taxand, the world's largest independent tax organization, which provides high quality, integrated tax advice worldwide, and represents the Global Network in the US and UK. Taxand professionals, including 770+ partners and more than 3,000+ advisors in 48 countries, grasp both the fine points of tax and the broader strategic implications, helping you mitigate risk, manage your tax burden and drive the performance of your business.

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