

Personal CFO

- Financial Reporting
- Net Worth Statements
- Entity Management
- Liquidity Review
- Risk Management (Insurance)
- Security/Identity Theft
- Residential Real Estate Support
- Collaborate w/ Outside Advisors

Wealth Preservation

- Portfolio Optimization
- Tactical Positioning
- Investment Selection
- Active Oversight
- Tax Investing
- Retirement Planning
- Succession Planning

Lifestyle & Household Management

- Cash Flow Modeling
- Expense Management
- Bill Pay
- Household Employees
- Education
- Private Aviation
- Elder Care
- Travel Arrangements
- Collectibles



Financial & Legacy Planning

- Asset/Investment Aggregation & Tracking
- Investment Performance
- Trust Accounting & Administrative Support
- Assist with Tax Information & Planning

Guided Philanthropy

- Foundations
- Endowments
- Charitable Lead Trusts
- Gifts to Individuals
- Gifting Collections (Non-Cash Items)

Brand & Communications

- Brand Strategy
- Key Messaging
- Media Relations
- Social Media
- Reputation Management
- Thought Leadership
- Partnerships
- Events