Family Office Service Menu

WALDRON
Private Wealth

TAX, LEGAL AND ESTATE PLANNING	FINANCIAL PLANNING	TRUST SERVICES	INVESTMENT MANAGEMENT	NEXT GENERATION WEALTH PLANNING	ACCOUNTING, TECHNOLOGY AND REPORTING	PHILANTHROPY	RISK MANAGEMENT	LIFESTYLE SERVICES
Trust Strategy Development & Implementation	Cash Flow Projections	Trust Administration Services	Overall Asset Allocation Development	Next Generation Education	Integrated Account Aggregation	Values & Mission Statement Creation	Pre-nuptial Planning	Medical Concierge Services
Estate Document Drafting	Lifestyle Security Spending Analysis	Family Trust Education	Investment Asset Location Selection	Next Generation Financial Problem Solving	Private Wealth Report	Next Generation Engagement	Risk Management Summary	Private Security
Income Tax Return Preparation	Family Budgeting	Principal & Income Reporting	Ongoing Tactical Allocation Shifts & Adjustments	Next Generation Investment Management	Consolidated Performance Review	Internal & External Goals Development	Family Limited Partnership Planning	Aircraft Charter & Management Services
Estate & Gift Tax Return Preparation	Real Estate Acquisition Analysis & Assistance	Trustee Investment Performance Reporting	Selection, Monitoring & Oversight of Managers	Family Meetings	Mobile App/Web Portal	Philanthropic Strategy Development	Asset Protection Strategies & Implementation	Private Aviation Acquisition Analysis & Assistance
Investment Portfolio Coordination	Other Asset Acquisition Analysis & Assistance	Private Trust Company Evaluation & Formation	Investment Security Selection & Management	Social Media Policies	Integrated Private Equity Reporting	Family Philanthropy Governance Guidelines	Offshore Trust Planning	Auto Purchase Assistance
Income Tax Return Summary	Ranch/Equestrian Expense Reporting	Trustee Compliance Services	Performance Reporting & Review	Family History Creation	Integrated Real Estate Reporting	Grant Systems & Guidelines Establishment	Disability Insurance Review & Implementation	Wellness Programs (Nutrition & Fitness)
Income Tax Projections & Planning	Optimizing IRA/Retirement Plan Annual Contributions	Corporate Directed Trust Services	Non-Managed Accounts Review & Oversight	Family Dynamics Consulting	Data Security	Grant Request Evaluation	Health Insurance Review	Secretarial & Personal Assistant Services
Planning Strategies Implementation	Mortgage Analysis & Assistance	Trust Accounting, Beneficiary Distributions & Bill Payment	Concentrated Stock Position Management	Life Coaching	Document Storage	Nonprofit Partners Research	Life Insurance Analysis & Review	Event Tickets
Planning Strategies Ongoing Administration	Company Retirement Plans	Trustee Web Portal	Private Placement/Private Equity Tracking	Family Boards	Bill Pay Services	Nonprofit Partners Strategic Negotiations	Life Insurance Annual Administration	Event Planning
Document Summaries (Wills, Trusts, etc.)	Refinancing Assessment & Coordination	Inventory & Assess Value of All Trust Assets	Alternative Investment Due Diligence & Oversight	Family Charter & Mission Development	Accounting & Record Keeping	Donation Outcomes Evaluation	Long Term Care Review & Implementation	Yacht Chartering Assistance
Annual Gifting Execution	Lending Solutions	Track All Expenditures and Additions to Trust Assets	After Tax Return Analysis			Private Foundation Establishment	Private Placement Life Insurance Structuring	Collectibles/Jewelry Management
Annual Gifting Tracking & Administration	Banking, Checking and Credit Cards	Court Accounting Preparation	Private Equity Direct Investments			Private Foundation Administration	Credit Monitoring	Vacation Club Analysis
Family Intellectual Property Planning	Employee Benefits Review		PE Direct Investment Due Diligence & Monitoring			Donor Advised Fund Setup, Funding & Administration	Property/Casualty Review & Placement	Personal Staff Hiring & Management
Intra-Family Loan Structuring & Tracking	Employee Benefits Distribution Election Review		Operating Business Management			Charity Gifting Letters	Personal & Family Security	Personal Staff Payroll Administration
Captive Insurance Company Implementation	Business Succession Planning		Operating Business Financial Consulting			Grant Proposals & Funding Structure	Federal & State Security Transaction Compliance	Property Management
Captive Insurance Company Administration	Financial Statement Analysis & Review		Investment Banking/M&A					
Legal Entity Structuring	Complex Asset Donations Coordination		Philanthropic Investment Strategies Development					
Employment Agreements Analysis & Review	Valuation Coordination							
Buy/Sell Agreements & Funding	Gift Sensitivity Analysis							
IRS Audit Assistance	Divorce Planning/Consulting							
Legal/Paralegal Services	Financial Capacity Determination							
Pre/Post Nuptial Agreements	Plan Feasibility Modeling							
Payroll/Excise Tax Compliance	Detailed Expense Reporting							
Presale Transaction Planning								
Divorce Filing & Execution								