Family Office Service Menu

WALDRON
Private Wealth

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

Services Waldron Provides

Integrated Partners