withum
AUDIT TAX ADVISORY

FAMILY OFFICE SERVICES

The members of WithumSmith+Brown's (Withum) Private Client Services Group possess the depth and breadth of skills and experience to cover all aspects of your business.

Family Offices face a number of unique challenges in addition to the traditional concerns of running a business. Be it varying viewpoints based on personal objectives, multigenerational issues, financial realities or philanthropic goals, a balance is required to achieve success. The Family Office specialists at WithumSmith+Brown (Withum) can provide the support you need to define and implement the right strategies to meet you and your family's long-term needs and objectives.

FAMILY OFFICE SERVICES

- Integrated Financial Strategies
- Client Information Management
- Wealth Transfer Planning
- Lifestyle Enhancements

Our Family Office specialists have dealt with family offices from those in early formation to those established, set in their direction and well administered.

FAMILY OFFICE SERVICES LEADERSHIP

Ray Russolillo, CPA/PFS, CFP®, CAP®
Partner, Team Leader, Family Office Services
T (212) 829 3214
rrussolillo@withum.com

Our highly responsive team of professionals offers deep industry expertise and service experience to help our clients grow and thrive...to BE IN A POSITION OF STRENGTH℠.

INTEGRATED FINANCIAL STRATEGIES

- Balance sheet analysis
- Integrated tax and income plan design
- Retirement planning
- Analysis of professional advisors and fees
- Tax and income plan implementation
- Bank financing analysis and negotiations
- Coordination of team of advisors

CLIENT INFORMATION MANAGEMENT

- Annual consolidated net worth statements
- Cash flow analysis
- Quarterly investment performance reports
- Quarterly investment partnership accounting
- Monthly entity accounting and reporting
- Annual status reports compared to plan
- Online access to custom reports
- Recordkeeping for personal property

WEALTH TRANSFER PLANNING

- Development of objectives
- Multi-generational snapshot of existing strategies
- Legal and tax strategies under consideration
- Financial modeling of alternative strategies
- Explanation of plans to owners
- Action plan to implement changes

LIFESTYLE ENHANCEMENTS

- Personal bill paying
- Domestic help and payroll
- Tax compliance
- Property management
- Cash flow management and forecasting
- Private travel management
- Aircraft / watercraft management
- Concierge services

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