

Wealth Management Needs

Wealth Management	Investment Management	Risk Management	Estate Planning	Philanthropic Management	Income Tax Planning	Business Planning
<p>Accounting</p> <ul style="list-style-type: none"> • Family • Trusts • Entities • Foundations <p>Tax Compliance</p> <ul style="list-style-type: none"> • Employee Payroll • Management • Household <p>Income Tax Returns</p> <ul style="list-style-type: none"> • Family • Trusts • Entities • Foundations • Gift Tax Returns • Estate Tax Returns <p>Banking Relationships</p> <p>Human Resource Management</p> <p>Family Reporting</p> <ul style="list-style-type: none"> • Quarterly • Annually 	<p>Portfolio Management</p> <ul style="list-style-type: none"> • Asset Allocation • Attribution Analysis • Performance Tracking • Cash Management <p>Private Placements</p> <p>Manager Selection</p> <ul style="list-style-type: none"> • Independent Analysis • No Soft Dollar Arrangements <p>Diversification Techniques</p> <ul style="list-style-type: none"> • Structured Products • Charitable Trusts <p>Stock Option Exercise Strategies</p> <p>Alternative Investments</p>	<p>Property and Casualty</p> <ul style="list-style-type: none"> • Home • Auto • Collectibles, Jewelry, Antiques, etc. • Personal Umbrella Liability • Directors and Officers Liability • Other Professional Liability <p>Life Insurance</p> <ul style="list-style-type: none"> • Survivor Protection • Estate Protection • Private Placement Products • Off the Shelf Products • Product Selection • Performance Review 	<p>Wills</p> <p>Trusts</p> <ul style="list-style-type: none"> • Revocable • Irrevocable • GRIT/QPRT • GRAT/GRUT <p>FLPs</p> <p>LLCs</p> <p>SCINs</p> <p>Defective Trusts</p> <p>Personal/Social Capital Issues</p> <p>Tax Payment Strategies</p> <ul style="list-style-type: none"> • Cash • Life Insurance • Business Split Dollar • Family Split Dollar <p>Asset Protection</p> <ul style="list-style-type: none"> • Offshore Planning • Domestic Trusts 	<p>Private Foundations</p> <p>Donor Advised Community Foundations</p> <p>Charitable Trusts</p> <ul style="list-style-type: none"> • Unitrusts • Annuity Trusts • Lead Trusts <p>Gift Annuities</p> <p>Pooled Income Funds</p> <p>Outright Gifts</p> <p>Beneficiary Selection</p>	<p>Quarterly Projections</p> <ul style="list-style-type: none"> • Withholding • Estimated Payments <p>Coordination with Business Entities</p> <p>Coordination with:</p> <p>Investment Management</p> <p>Philanthropic Management</p> <p>AMT Impact</p>	<p>Succession Issues</p> <p>Re-capitalization</p> <p>Income Tax Coordination</p> <p>General Compliance Issues</p> <ul style="list-style-type: none"> • Minutes • Employment Contracts <p>Retirement Plans</p> <ul style="list-style-type: none"> • Qualified • Non-qualified <p>Employee Benefits</p> <p>Executive Benefit Plans</p>