

# FAMILY OFFICE AND BUSINESS MANAGEMENT SERVICES

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## Services for Individuals, Families and Multi-Generational, Family-Owned Businesses

Serving high net worth individuals, their families, their businesses and their charitable interests has long been a particular focus and strength for Marks Paneth & Shron LLP (MP&S). We have assisted these clients in enhancing, preserving and managing their wealth by providing family office, tax, trust and estate, and strategic planning guidance to them. We have maintained long relationships with many of these clients, in some cases for decades. These long-term client relationships demonstrate that our client-focus and the breadth and depth of our expertise are qualities our clients value greatly.

### Services Offered:

- Business Management Services
  - Bill payment and cash flow management - These services are flexible and can be structured to meet the individual client's needs and preferences. In some cases, all of the client's bills come to our office directly. In other situations, clients prefer to send approved bills to us on a regular basis. We coordinate funds to arrange for payment of taxes and work with clients' investment advisors to ensure short and long-term investment needs are met. Each client has a unique situation that we are prepared to anticipate and accommodate.
  - Management of Personal and Family Employees
  - Payroll Administration
  - Assistance with Purchasing and Selling of Assets
- Life and Disability Insurance Consulting
- Risk Analysis for Property and Casualty Insurance and Personal Security
- Trust and Estate Planning
- Tax Planning and Compliance Services
- Concierge Services
- Coordinate with Attorneys to Provide Lifetime and Post-Mortem Estate, Gift and Income Tax Planning
- Identification, Organization and Analysis of Assets and Liabilities
- Preparation of Estate Tax and Fiduciary Income Tax Returns and Related Filings