OUR SERVICES

CUSTOMIZED FINANCIAL REPORTING

Marks Paneth & Shron LLP is a leading provider of services to high net worth individuals and their families as well as family investment partnerships. We assist these clients in enhancing, preserving and managing their wealth.

High net worth individuals and their families typically have multiple investment accounts with many brokers. Managing these numerous accounts can be a very difficult and time-consuming task. As part of Marks Paneth & Shron's commitment to client service, we offer our clients a fully customizable reporting system.

Our system electronically compiles all the data from the individual brokerage accounts so that we can customize a full array of reports to suit any client's needs. Our reports can track consolidated performance, individual broker performance, equity allocation and industry exposure.

For those clients who want online access to their information, we provide a secure client portal. Each account is password protected and can be tailored to meet individual or family needs. This means that the head of the group can view all the accounts under his or her control, while members of the group will see only the specific accounts that apply to them.

For clients who prefer hard copies of their reports, we can provide their information either as a printed document or electronically via e-mail.

As an additional service, we offer online storage for clients' important documents. This service facilitates easy access to wills, trust agreements, contracts, and any other valuable papers.

Services Offered:

- Personalized Reporting
- Secure Online Portal
- Real-Time Portfolio Market Value
- Analyze Performance on a Broker-by-Broker Basis
- Customized Views of Account Information
- Secure Online Document Storage
- Flexible Reporting Delivery
- Easily View Realized Gains and Losses

MP&S Marks Paneth & Shron LLP
Certified Public Accountants & Consultants