

SELF-ASSESSMENT

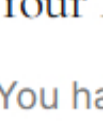
Do I Need a Family Office?

Wealth brings complexity. When managing it starts to detract from your quality of life, it may be time for professional infrastructure.

When the management of investments, taxes, and legal structures begins to detract from your family's quality of life, a Family Office provides the necessary professional infrastructure to **regain control and focus**.

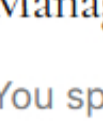
SIGNS TO WATCH

You May Need a Family Office If...




Your Finances Have Become Complex

You have investments across multiple institutions, jurisdictions, or asset classes and struggle to see the complete picture.



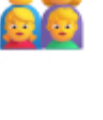
Managing Wealth Takes Too Much Time

You spend significant time coordinating with advisors, reviewing statements, and handling administrative tasks.




Your Advisors Don't Communicate

Your accountant, lawyer, banker, and investment advisor work in silos without coordinating their advice or strategies.




You're Thinking About the Next Generation

You want to ensure wealth is transferred smoothly and that your children are prepared to manage it responsibly.



You Worry About What You're Missing

You suspect there are tax optimization opportunities, risks, or better investment options that you're not aware of.



You Want Continuity & Protection

You want someone who knows your family and wealth to step in if something happens to the primary decision-maker.

THE ADVANTAGES

Family Office Benefits

What you gain when you partner with a family office.

- 01

Integrated Financial Plan

An integrated plan for your family's complete financial affairs, including investments, reporting, proactive tax planning, succession planning, and optimal ownership structures.
- 02

Optimal Investment Policy

A disciplined process that includes strategic asset allocation, selection and oversight of money managers, effective diversification, and consolidated performance reporting.
- 03

Time Savings & Complexity Management

Having a family office coordinate and oversee all the components of your integrated financial affairs frees you to focus on what matters most to you.
- 04

Cost Savings Through Pooled Purchasing

Access to institutional-grade investment terms, reduced management fees, and discounted share classes that would not be available individually.
- 05

Advisor Coordination

Coordination of your professional advisors—lawyers, accountants, investment and insurance advisors—to ensure your family's objectives are met and nothing falls through the cracks.
- 06

Strategic Philanthropy

A strategic approach to charitable giving that maximizes impact and tax benefits while reflecting your family's values and legacy goals.
- 07

Continuity & Peace of Mind

The confidence that, if something happens to your main family decision-maker, there will be someone in place who knows your family and wealth to help manage through transitions.
- 08

Boutique, Personalized Service

The proactive, personalized, and highly responsive service of an employee-owned boutique firm that treats your wealth as if it were their own.

IS IT RIGHT FOR YOU?

Who Benefits Most

Family office services are typically most valuable for families with:

- ✓ Investable assets of **\$5 million or more**
- ✓ Complex financial situations (multiple entities, jurisdictions, or asset types)
- ✓ A desire for integrated, holistic financial management
- ✓ Multi-generational wealth with succession planning needs
- ✓ A preference for objective, fee-only advice

QUICK ASSESSMENT

Answer These Questions

Do you have a single, consolidated view of all your family's assets and liabilities?

Are you confident that all your advisors are coordinating effectively?

Do you have a documented plan for transferring wealth to the next generation?

Is someone prepared to step in if the primary decision-maker is unavailable?

Are you confident you're minimizing taxes across all jurisdictions?

Do you have time to focus on what matters most—family, business, passions?

If you answered **"no"** to any of these, a family office may be able to help.

CONTINUE LEARNING

Related Resources

← What is a Family Office?

Learn the fundamentals of family offices, their history, and how they differ from traditional advisors.

Choosing the Right Family Office →

Ready to explore? Learn what questions to ask when selecting your family office partner.

Let's discuss whether a family office is right for your situation.

Schedule a Consultation

