plante moran | Wealth Management

Family Office Services

Nationally recognized for our expertise and bench strength of over 180 dedicated family office professionals.

Our family office service group provides affluent families and family offices, a complete range of planning, risk mitigation, and compliance services throughout the nation. Some clients benefit from our comprehensive, virtual or turnkey family office solutions; while other small, midsize, or large family offices will have a more specific need, and will choose one or several experts to work with their existing trusted advisors. Bottom line: Our expertise and bench strength means that we have the resources to tailor a custom family office solution and the flexibility to adapt to the ever-changing needs of your family.

Our core services

Because we don't sell products, manage assets, or earn commissions, we'll provide objective advice on taxes, wealth transfer, investments, business and family concerns in support of your family mission.

Each family office client has a single-lead relationship partner, and each client experience requires a customized approach. We're here to understand your challenges and goals, whether your family office is mature with a large sophisticated staff, or has just formed after a significant financial event. Most engagements start with one or more of the following core services:

TAX

- Coordination of income tax, charitable giving, investment, and wealth transfer strategies
- Management of large complex tax preparation engagements
- Individual income tax planning and compliance
- Experts in trusts and partnerships
- Formation of private foundations and related tax compliance

WEALTH TRANSFER & ESTATE PLANNING

- Sophisticated wealth transfer strategies and compliance
- Business transition services
- Philanthropic planning
- Private trust company audit, tax, and other consulting

ACCOUNTING & AUDIT

- Outsourced full back office, including bill pay, bookkeeping, and formal fiduciary accounting
- Audit and other assurance services

CONSULTING

- Family office formation, including entity choice, tax structuring, and operational efficiency
- Internal control, organizational risk assessment, and operational best-practice consulting
- Cybersecurity reviews
- Transaction advisory services, including buy-side and sell-side due diligence
- Information technology consulting: Assessment, planning, selection, and implementation
- Family meeting planning, mission statements, and communication strategies
- Solutions for virtual family offices

INVESTMENT ADVISORY

- Real estate consulting, monitoring, and bookkeeping
- Independent financial advisory*, trustee services*, and life insurance consulting*

*Services provided by affiliated entities of Plante Moran.

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Tailored, industry-specific expertise

Plante Moran is organized around industry and technical expertise. In fact, many of our more than 180 family offices experts have worked in other industries. For example, our family office cybersecurity team has experience serving the financial services industry, including community banks, investment funds, and broker dealers. Similarly, many of our tax and audit experts have experience with our investment fund (real estate and private equity) clients. This unique pairing of family office expertise with other industry experiences results in a broader perspective and a more robust transfer of best practices to our clients.

About Plante Moran

Plante Moran is among the nation's largest certified public accounting and business advisory firms.

3,100+ total staff

350+ partners & affiliate principals

approx. **1,300** number of CPAs

26 U.S. & global locations, including China, India, Japan, & Mexico

27 foreign languages of professional staff

Access to 47,000+ professionals in 100+ countries as a founding member of Praxity, AISBL, the world's largest global alliance of accounting firms.

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