

## Family Office Services

E. Cohen's **Family Office Services** are a unique blend of services and tailored solutions designed to help simplify your life and achieve your wealth objectives. Properly managing a family's wealth can be time consuming and requires a high level of financial expertise. Our team members work with your entire family to learn their specific goals and requirements to create personalized plans to preserve and protect your family's wealth for generations to come. Regardless of whether your family has built its wealth for decades or recently experienced a liquidity event, we help manage your family's affairs with the highest level of personal attention and discretion so you can truly enjoy your wealth.

Leveraging both in-house expertise and our vast network of highly qualified professionals, **we deliver fully integrated solutions** that include:

### ACCOUNTING AND BILL PAYMENT SERVICES



Our accounting team provides high-net-worth families with a wide array of **accounting and bill payment services** to manage and monitor cash flow and budgeting.

- Accounting and Reporting
- Preparing Financial Reports Showing Cash Flow, Income, Gains, and Losses
- Bill Payment Services
- Income Statement
- Budgeting, Cash Flow Management, and Forecasting
- Statement of Assets and Liabilities
- Evaluation of Net Worth
- Household Employee Payroll Administration and Compliance

### INCOME TAX COMPLIANCE AND PLANNING SERVICES



Tax considerations are behind nearly every major personal financial decision. Our tax experts work with you to develop comprehensive tax strategies for your family to **minimize federal and state income tax**, along with providing year-round planning to minimize estimated tax payments and penalties.

- Federal and State Income Compliance
- Tax Domicile Planning
- Federal and State Income Tax Planning and Tax Projections

### ESTATE, GIFT, AND TRUST PLANNING



Our estate planning professionals can help you to manage your affairs during your lifetime and assist with the distribution of your wealth after death. With an **effective estate plan** in place, your financial wishes are outlined to ensure that they are carried out just as you intended. We would document your plan to make sure the entire family knows how assets will be allocated and distributed.

- Estate, Gift, and Trust Compliance
- Review of Estate Documents and Planning
- Life Insurance Review
- Oversight of Trust Creation and Gift Planning
- Family Limited Partnership Creation and Administration

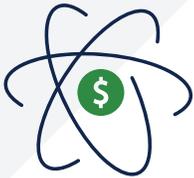
## WEALTH MANAGEMENT AND RETIREMENT PLANNING SERVICES



Our wealth management team consults with you and your family's other trusted advisors to help **manage your investment portfolio** so that you understand the principles and strategies to best manage your risk tolerance, time horizon, and goals. Our retirement planning team can help you develop a sound approach to your retirement, no matter how close or far away that time may be. From laying out income sources, distribution plans, Social Security payments, personal savings, and investments, we make sure you know what to expect.

- Intergenerational Wealth Planning
- Oversight of Various Wealth Advisors
- Consolidated Investment Reporting
- Management of Investment Portfolio
- Financial Planning and Cash Flow Management
- Investment Performance Analysis
- Review Venture Capital/Private Equity Deals

## ASSET MANAGEMENT, RISK MANAGEMENT, AND INSURANCE SERVICES



E. Cohen provides a range of **asset and risk management and insurance services** to ensure your family's health and financial wellbeing are protected.

- Insurance Analysis and Oversight
- Risk Management Review
- Disability, Life, Property, and Casualty Insurance
- Officers and Directors Liability
- Valuation Services
- Comprehensive Oversight of Family Assets
- Recordkeeping, Appraisal, and Protection of Collectibles
- Negotiating Loans

## PHILANTHROPY PLANNING SERVICES



At E. Cohen, we understand that your family may wish to contribute to society through **philanthropic initiatives** that reflect their personal vision and values. Our Family Office team members can help advise, consult, and manage your family's philanthropic endeavors to ensure your wealth goes to the causes you support.

- Mission Statements
- Philanthropic Planning and Administration
- Personal Giving and Donor Advised Funds
- Foundation Creation, Administration, and Management
- Creation of Gift Trust Accounts and Management

## FAMILY OFFICE ADMINISTRATION SERVICES



E. Cohen offers a highly flexible approach to **family office administration and management**. We provide tailor-made solutions to help manage your family's assets, schedules, healthcare, and other personal needs.

- Financial and Business Education
- Family Office Governance, Formation, Meetings, etc.
- Succession Planning
- Family Office Staff Management
- Property Administration and Management
- Legal and Dispute Coordination
- Elder Care Coordination and Management
- Event and Travel Planning
- Collectibles Administration and Management
- Coordination and Management of Domestic Services
- Information Technology and Cybersecurity
- General Administrative and Personal Assistance
- Personal Security
- Other Concierge Services