

FAMILY OFFICE SERVICES

FAMILY
OFFICE
and Wealth Management

AMD CAN HELP FAMILIES ACHIEVE PERSONAL AND BUSINESS GOALS

STRATEGIES TO MAINTAIN AND ENHANCE FAMILY WEALTH

FAMILY OFFICE and Wealth Management

What You Should Know

Family Offices are the preferred wealth management structure for high net worth families.

- ◆ Successful Family Offices have integrated strategies to maintain and optimize wealth while adhering to the family's mission, governance structure, estate and tax planning, philanthropic plans and the education of future generations.
- ◆ From large, mature family offices to newly created single family offices and everything in between, all Family Offices need guidance and assistance in managing wealth.
- ◆ High net worth families share similar predictable challenges and opportunities yet face individual ones based on business type and family dynamics.
- ◆ Highly operational Family Offices determine their family goals and objectives upfront and prioritize the services needed to achieve them.
- ◆ Up-to-date and ongoing advice on best practices, including charitable giving, after-tax investment strategies, capital purchases, wealth transfer, internal controls, private equity and venture capital support and inter-family communication is essential for today's Family Office.
- ◆ Family offices are an avenue to share history, perpetuate the family name and provide financial security for children and grandchildren and their families.

What AMD Can Do

Deliver value through our dedication to your Family Office.

- ◆ Assist you to establish a Family Office or assess and improve the operational structure of an existing one.
- ◆ Adhere to our commitment to integrity, reliability, technical expertise and superior client service to help you achieve your financial goals.
- ◆ Provide accounting services such as bill paying, accounting and financial statement preparation, investment accounting, insurance coordination, budget and cash flow projections and payroll reporting for Family Offices.
- ◆ Advise Family Offices on comprehensive tax and wealth planning issues including individual income tax planning and compliance, estate and gift tax planning and compliance, valuations, succession, family limited partnership structuring and wealth accumulation and management.
- ◆ Inform Family Offices on economic trends, new regulations, changes in the tax law and advice on how these issues can affect your financial security.
- ◆ Maximize the effectiveness of your Family Office by providing an objective perspective and practical advice.
- ◆ For more information, contact:

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PROVIDING SOLUTIONS

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We are consultants, accountants, forensic and valuation experts, advisors, technology **solution providers** and wealth managers. Since our founding more than four decades ago, AMD has delivered **full-service** accounting, tax and consulting services to the business marketplace and individuals. Our continuous growth is attributed to our philosophy of going beyond traditional accounting services by linking **sophisticated technology** with personal expertise to provide the highest quality service possible. We use our knowledge to serve as a single financial resource for **Family Offices** and the families they support.



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