Family Office Services Overview

Urish Popeck has the answers to all of your family office needs

www.urishpopeck.com

Why Family Office Services?

- Provide cost-effective ways to coordinate managing complex financial structures for families
- Beneficiaries are families whose level of wealth requires sophisticated planning techniques, consolidated investment performance reporting, and flexible financial information systems and reporting

What services are offered?

Family Governance and Education

- Coordination of family meetings and dispute consultation
- Promote fostering of family values to next generation to ensure financial responsibility
- Ensure the overarching family vision and written family mission statement are met and coordinated with all of the following systems and processes

Trust and Estate Planning

- Comprehensive estate and trust planning services, including the review of testamentary documents
- Work with the client's attorneys to construct comprehensive generational wealth strategies
- Monitor and proactively review and update the plan annually
- Settles estates and administers trust accounts

Business Succession Planning

- Focus on integration of all data as it pertains to the succession of key businesses
- Important in cases of closely held family business as it relates to mergers and acquisitions, strategic financial and market analysis, transfer of stock, key incentive and management compensation plans, and detailed financial modeling of options

Insurance Review and Administration

- Review insurance coverage, recommend adjustments if appropriate, and handle insurance administration tasks

Concierge Services

- Provide wide range of concierge services to our clients
- Services included, but not limited to: communication on behalf of a client; letter writing; bill payment; travel coordination; hiring, supervision, termination of house staff; purchase of automobiles, aircraft, watercraft and houses; storage/transport of valuables; assistance with private school placement; real estate management and maintenance; other research and special projects

Private Banking

- Receive favorable attention and rates in obtaining personal lines of credit, residential "bridge" loans, personal investment financing, construction and jumbo mortgages, business acquisition financing and start up business ventures

Performance Investment Measurement and Reporting

- Comprehensive and consolidated reports (securities, equity, etc)
- Reports are current (real time) to be viewed at client's leisure

Tax Planning and Compliance

- Full range of tax services (preparation of individual, trust, estate, foundation, gift, partnership, family limited partnership, foreign, and all state returns)
- Quarterly review of tax situations
- Files returns and quarterly estimates

Personal Financial Reports

- Receive consolidated financial report (includes net worth analysis and captures all income and expenses as well as a cash flow management report)
- Statements also prepared for client's entities (partnership, "C" and "S" corporations, and foreign corporations)

(Continued on reverse)

Family Philanthropy

- Provides all aspects of Foundation management (establishment of foundation, record keeping, monitoring of minimum distribution requirements, policy statement preparation and review, grant administration and site visitation)
- Focuses on funding charitable entities
- Ensure client's individual philanthropic interests are fulfilled

Risk Management and Oversight of Downside Risks

- Review trusteeships, wealth transfers, insurance, financial systems and personal security risks

Technology

- Receives understandable internet accessible reports
- Capacity to allow a client access to electronic repository for record keeping and retrieval
- Receive computer and technology training and assistance upon request