Family Enterprise Service Menu

WALDRON
Private Wealth

FINANCIAL MANAGEMENT

TAX, LEGAL AND ESTATE PLANNING	FINANCIAL PLANNING	TRUST SERVICES	INVESTMENT MANAGEMENT	ACCOUNTING, TECHNOLOGY AND REPORTING
Trust Strategy Development & Implementation	Cash Flow Projections	Trust Administration Services	Overall Asset Allocation Development	Integrated Account Aggregation
Estate Document Drafting	Lifestyle Security Spending Analysis	Family Trust Education	Investment Asset Location Selection	Private Wealth Report
Income Tax Return Preparation	Family Budgeting	Principal & Income Reporting	Ongoing Tactical Allocation Shifts & Adjustments	Consolidated Performance Review
Estate & Gift Tax Return Preparation	Real Estate Acquisition Analysis & Assistance	Trustee Investment Performance Reporting	Selection, Monitoring & Oversight of Managers	Mobile App/Web Portal
Investment Portfolio Coordination	Other Asset Acquisition Analysis & Assistance	Private Trust Company Evaluation & Formation	Investment Security Selection & Management	Integrated Private Equity Reporting
Income Tax Return Summary	Ranch/Equestrian Expense Reporting	Trustee Compliance Services	Performance Reporting & Review	Integrated Real Estate Reporting
Income Tax Projections & Planning	Optimizing IRA/Retirement Plan Annual Contributions	Corporate Directed Trust Services	Non-Managed Accounts Review & Oversight	Data Security
Planning Strategies Implementation	Mortgage Analysis & Assistance	Trust Accounting, Beneficiary Distributions & Bill Payment	Concentrated Stock Position Management	Document Storage
Planning Strategies Ongoing Administration	Company Retirement Plans	Trustee Web Portal	Private Placement/Private Equity Tracking	Bill Pay Services
Document Summaries (Wills, Trusts, etc.)	Refinancing Assessment & Coordination	Inventory & Assess Value of All Trust Assets	Alternative Investment Due Diligence & Oversight	Accounting & Record Keeping
Annual Gifting Execution	Lending Solutions	Track All Expenditures and Additions to Trust Assets	After Tax Return Analysis	
Annual Gifting Tracking & Administration	Banking, Checking and Credit Cards	Court Accounting Preparation	Private Equity Direct Investments	
Family Intellectual Property Planning	Employee Benefits Review		PE Direct Investment Due Diligence & Monitoring	
Intra-Family Loan Structuring & Tracking	Employee Benefits Distribution Election Review		Operating Business Management	
Legal Entity Structuring	Financial Statement Analysis & Review		Operating Business Financial Consulting	
Employment Agreements Analysis & Review	Complex Asset Donations Coordination		Investment Banking/M&A	
IRS Audit Assistance	Valuation Coordination		Philanthropic Investment Strategies Development	
Legal/Paralegal Services	Gift Sensitivity Analysis			
Pre/Post Nuptial Agreements	Divorce Planning/Consulting			
Payroll/Excise Tax Compliance	Financial Capacity Determination			
Divorce Filing & Execution	Plan Feasibility Modeling			
	Detailed Expense Reporting			

FAMILY ENTERPRISE SERIVCES

EDUCATION AND TRANSITION	PHILANTHROPY
Next Generation Education	Values & Mission Statement Creation
Next Generation Engagement	Internal & External Goals Development
Next Generation Financial Problem Solving	Philanthropic Strategy Development
Next Generation Investment Management	Family Philanthropy Governance Guidelines
Family Meetings	Grant Systems & Guidelines Establishment
Social Media Policies	Grant Request Evaluation
Family History Creation	Nonprofit Partners Research
Family Dynamics Consulting	Nonprofit Partners Strategic Negotiations
Life Coaching	Donation Outcomes Evaluation
Family Boards	Private Foundation Establishment
Family Charter & Mission Development	Private Foundation Administration
	Donor Advised Fund Setup, Funding & Administration
	Charity Gifting Letters
	Grant Proposals & Funding Structure

BUSINESS OWNER

ADVISORY SERVICES
Pre-Transaction Planning
Succession Planning Evaluation
Transaction Structuring Analysis
Entity Review & Structuring
Deal Representation Selection
Lending Solutions
Ownership Structure Optimization
Business Valuation Services
Buy/Sell Agreements
Business SWOT Analysis
Business Real Estate Analysis
Quality of Earnings Analysis
Business Cash Management
Post Transaction Planning
Businesss Life Insurance Planning
Cash Flow Needs Analysis
Captive Insurance Company Implementation
Captive Insurance Company Administration

LIFESTYLE SERVICES

RISK MANAGEMENT	CONCIERGE SERVICES
Pre-nuptial Planning	Medical Concierge Services
Risk Management Summary	Private Security
Family Limited Partnership Planning	Aircraft Charter & Management Services
Asset Protection Strategies & Implementation	Private Aviation Acquisition Analysis & Assistance
Offshore Trust Planning	Auto Purchase Assistance
Disability Insurance Review & Implementation	Wellness Programs (Nutrition & Fitness)
Health Insurance Review	Secretarial & Personal Assistant Services
Life Insurance Analysis & Review	Event Tickets
Life Insurance Annual Administration	Event Planning
Long Term Care Review & Implementation	Yacht Chartering Assistance
Private Placement Life Insurance Structuring	Collectibles/Jewelry Management
Credit Monitoring	Vacation Club Analysis
Property/Casualty Review & Placement	Personal Staff Hiring & Management
Personal & Family Security	Personal Staff Payroll Administration
Federal & State Security Transaction Compliance	Property Management

Services Waldron Provides
Integrated Partners