



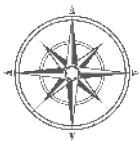
STRATEGIC WEALTH INC.
GLOBAL ASSET MANAGEMENT

FAMILY OFFICE SERVICES

An Introduction

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STRATEGIC WEALTH INC.

GLOBAL ASSET MANAGEMENT

Family Office Services

1. Strategy

- Estate and Wealth Transfer
- Business and Financial Advisory
- Continuing Education

2. Advisory

- Tax and Legal
- Forensic Accounting
- Insurance and Risk Management
- Compliance

3. Financial Planning

- Investment Management
- Philanthropy
- Family Budgeting

4. Governance

- Records and Reporting
- Administration
- Succession Planning



Strategy

1

Estate and Wealth Transfer

- Wealth protection strategies
- Estate settlement and administration
- Family governance guidance
- Intergenerational wealth transfer analysis and recommendations

2

Business and Financial Advisory

- Debt syndication
- Bridge financing
- Private equity
- Structured finance
- Management buyouts

3

Continuing Education

- Next generation financial literacy initiatives
- Business succession coaching
- Outside advisor sessions
- Family roundtables



Advisory

1

Tax and Legal Advisory

- Core and advanced tax planning
- Tax advantageous estate planning and investment solutions
- Tax compliance and transparency

2

Forensic Accounting

- Perform forensic research to trace funds and identify assets for recovery
- Conducts forensic analysis of financial data
- Prepares forensic accounting reports from financial findings
- Prepares analytical data for litigation and testifies as needed

3

Risk Management and Insurance

- Risk analysis reporting
- Insurance strategy
- Policy review, policy acquisition and monitoring
- Titling of assets
- Disaster recovery planning
- Offshore accounts
- Cyber and data security
- Reputation management strategy

4

Compliance

- Audit services
- Corporate governance oversight committees
- Employment verification
- Performance monitoring across all functions
- Board advisory formation
- Keeping in step with regulations



Financial Planning

1

Investment Management Services

- Overall financial “check-up”
- Investment objectives and long-term goals
- Asset allocation
- Definition of risk profiles
- Banking relationships
- Liquidity management
- Investment research and analysis

2

Philanthropic Management

- Charitable giving strategy
- Formation and management of charitable institutions
- Establishment of foundations and trusts
- Due diligence

3

Family Budgeting

- Concierge services
- Club memberships
- Management of secondary real estate
- Wealth reviews
- Analysis and reporting of liquidity requirements and objectives



Governance

1

Records and Reporting

- Organization and reporting on all family assets
- Benchmark analysis
- Annual performance reporting
- Tax preparation

2

Administration

- General legal issues
- Tax compliance, taxes, invoices
- Expense review and bill payment
- Bank account maintenance
- Employee benefit programs
- Legal firm management
- Public relations firm management
- Technology consulting

3

Succession Planning

- Continuity strategy and game plans
- Executive evaluation and review
- Family board selection and review
- Corporate social responsibility structures
- Training programs
- Estate transfer planning execution
- Family charter and/or constitution



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CONTACT US

To learn more about our
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