

Meredith & Associates  
Family Office Services

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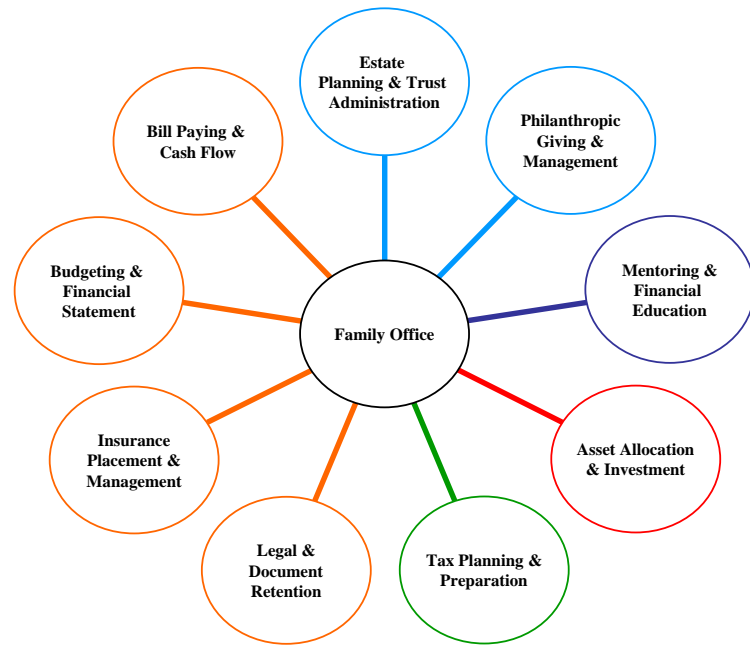
## Reasons A Family May Consider A “Family Office”






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- Family’s financial assets grow to be a level that requires full time professional management.
- Time required by the family member/s to manage family’s personal assets is detracting from effective running of the business—and the business is at risk of suffering.
- Family member/s want to separate management of their personal financial assets from those of the business for purposes of confidentiality.
- Family has become multi-generational; involvement of founding patriarch/matriarch is waning or no longer available; next generation not ready/willing to take on asset/business management responsibility.
- Needs of growing number of family members, requiring increasingly diverse asset management services, can no longer be effectively met by a family’s existing resources.



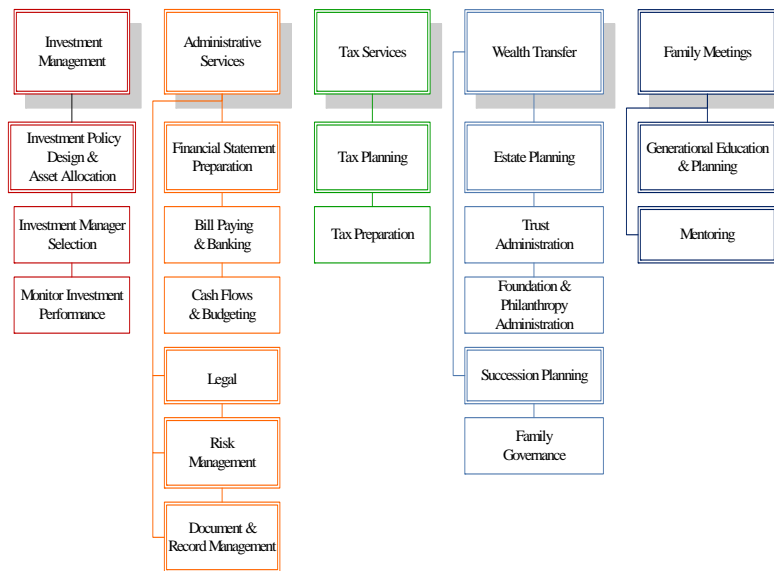
Coordination & Management



-  Wealth Transfer
-  Administrative Services
-  Tax Services
-  Investment Management
-  Family Meetings



# Family Office Services





## Advising the Family Foundation

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### The CPA As Advisor:

- Preparer of financial statements
- Auditor of financial statements
- Preparer of tax returns
- Management consultant
- Information technology consultant
- Human resources consultant
- Investment advisor

### The CPA As Board Member:

- “Outside” director
- Treasurer
- Preparer of financial budget
- Preparer of grant-making budget
- Monitor of grant-making
- Chief financial officer
- Calculator of tax on net investment income
- Chairman of finance committee
- Chairman of audit committee
- Chairman of investment committee
- Signer of tax returns



*Wealth Transfer*



## Additional Family Office Services

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- Managing new business acquisitions and negotiating the process.
- Advising executive team and/or Board of Directors on issues concerning finance, accounting, taxation, cost controls, insurance and general business management, etc.
- Supervising the purchase and/or sale of homes and other real estate.
- Overseeing of attorneys; managing lawsuits and serving as an expert witness.
- Mentoring and advising next generation on financially sensitive issues such as “pre-nups,” business opportunities, philanthropic involvements and general fiscal stewardship and responsibility.
- Mediating family member conflicts.