



FAMILY OFFICE SERVICES

Providing a Comprehensive Solution
to High Net Worth Clients

Alvarez & Marsal's Family Office Services is dedicated to helping clients successfully manage wealth and plan for the future by acting as the family CFO overseeing all aspects of personal and business interests. Our priority is to work with clients to achieve their long-term goals and deliver highly personalized solutions that suit our client's unique needs.

➔ We serve as advisor, advocate, teammate and partner, maintaining the anonymity and trusted support that families desire.

Our services include:



Consolidated Financial Reporting

A clear and comprehensive view of both personal and entity-level financials, enabling a full understanding of the overall financial picture streamlining decision making and insight.



Masttro Investment Reporting

The Masttro platform offers advanced consolidated investment reporting, providing a clear, real-time view of all holdings.



Cash and Expense Reconciliations

We identify discrepancies, prevent fraud, and ensure that all financial transactions are closely monitored and accurately recorded.



Financial Budgeting, Forecasting and Analysis

Accurate budgeting and forecasting ensures that resources are allocated efficiently, providing insights into performance allowing for strategy adjustments as needed.



Bill Pay and Concierge Services

Let us simplify your life by handling routine payments and enhance your lifestyle by addressing both financial and non-financial tasks.



Special Situation Advisory

Management of complex scenarios like insurance reviews and health claim management, advisory for aviation purchases or leases, and developing legal entity strategies.



Estate Structuring and Advisory

Independent advisory for effective wealth transfer and tax optimization, ensuring that family estates are aligned with future financial goals.



Data and Document Repository

Centralization of data enhances efficiency, simplifies record-keeping, and ensures that important information is available for decision-making, compliance, and reporting.



Fiduciary and Trust Accounting

Ensures accurate management and reporting of trust assets, providing transparency and compliance with legal requirements.



CFO Services

We play a critical role in overseeing budgeting, cash flow management, and tax planning, aligning all financial activities with the family's objectives.



Maritime and Aviation Reporting & Strategy

Strategic planning ensures efficient asset management by addressing operational, financial, and legal considerations.



Real Estate and Investment Analysis & Underwriting

Independent assessments of real estate and other direct investments help to manage and understand risks effectively ensuring informed decision-making and outcomes.

Financial Reporting & Accounting

→ Your family deserves personalized financial reporting and accounting services to help achieve your goals.

As your family CFO, our team will:

- Act as the central point of contact between investment advisors, attorneys, tax team, insurance providers, and family support staff
- Provide accounting services to family-owned businesses and foundations and perform entity reporting to comply with requirements of trust and estate documents
- Prepare personal financial statements to consolidate all investment holdings, liabilities, and net worth
- Prepare an annual budget of expenses and analyze the budget to actual activity

Protecting & Organizing Family Assets

→ Managing risk and producing comprehensive financial reporting is an integral part of planning for your family's future.

As your trusted advisor, our team will:

- Focus on asset protection and estate planning to ensure alignment with our clients' long-term objectives
- Minimize cybersecurity risks by implementing best practices to secure personal data
- Perform annual insurance review of the home, auto and collections
- Assist with special projects including large asset purchases and insurance claims
- Support bill payment by contacting vendors and providing overall administrative support
- Provide concierge and administrative services such as research on special projects

Key Contact



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ABOUT ALVAREZ & MARSAL TAX

Alvarez & Marsal Tax, part of Alvarez & Marsal (A&M), a leading global professional services firm, is an independent tax group made up of experienced tax professionals dedicated to providing customized tax advice to clients and investors across a broad range of industries. Its professionals extend A&M's commitment to offering clients a choice in advisors who are free from audit-based conflicts of interest, and bring an unyielding commitment to delivering responsive client service. A&M Tax has global presence in major metropolitan markets throughout the Americas, EMEA, and APAC.

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