



A&M FAMILY OFFICE SERVICES

A&M and Mastro: Combining Knowledge, Experience and Market-Leading Family Office Technology

As the number of ultra-high wealth individuals (UHWIs) hits record levels, wealth management and family offices have become more important than ever to help navigate complex requirements, protect data and successfully grow and pass on assets. Utilizing Mastro wealth management technology, our Family Office Services provide wealth owners a full-service platform to centralize and manage the full breadth of each client's tax and financial affairs.

Mastro is a global wealth technology platform that provides a customizable portal to view and analyze all enterprise and personal wealth, offering a 360-degree view of net worth across all financial and non-financial assets, and ownership structures through an intuitive, client-centric user experience.

With Mastro, Our Team Can Help You



Improve investment performance with near real-time data and visibility into your portfolio



Avoid mistakes and manage risk to protect your family wealth over time



Organize your financial world with a single wealth management platform and reporting tool

A Holistic Wealth Technology Platform to Serve You

Mastro's state of the art platform provides a user-friendly dashboard that gives you instant access to total net worth and specific holdings for every asset type

Featuring advanced performance reporting, document management and communications, Mastro tracks all trusts, foundations, entities, ownership and beneficiaries. Also monitored are all alternative investments, real estate and collectible assets.

With cyberattacks more prevalent than ever, cybersecurity is a must-have for everyone, especially family offices. Built with the highest global standards for security, privacy and confidentiality, Mastro employs cryptographic sequencing paired with best practices in data security to safeguard the privacy and confidentiality of family data.



Mastro's intuitive, customizable portal provides a single point of access to all wealth data.

We work with multiple generations to not only ensure the smooth transfer of wealth between family members, but to also help educate UHWIs and their heirs on money management and family leadership to support informed decisions.



A&M's Family Office Services

Alvarez & Marsal's Family Office Services helps family offices successfully manage their wealth and plan for the future with innovative technology to oversee 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 clients' unique needs. Our high-net-worth individuals, families and their enterprises have access to integrated services through our broader A&M network of capabilities and experts.

The People Behind the Service

When it comes to matters of family wealth management, having a trustworthy team is critical. A&M's Family Office Services team is staffed by experienced tax and accounting experts who care about you and your assets. Leading this team are:

- **Alan Kirschenbaum** – Head of A&M's Private Client Services practice, Alan has extensive experience with assisting high net worth families and individuals with liquidity analysis and planning, integration of tax planning strategies and multi-generational relationship management.
- **Jason Conley** – A Director with A&M's Private Client Services practice, Jason has more than a decade experience working with clients on complex accounting issues and advises high-net-worth families responsible for investment and financial reporting, asset protection and family office governance.

A&M Tax Key Contacts



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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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