

Family Office

Introduction

High-net-worth families understand the importance of comprehensive financial management. Our Family Office services are designed to complement your Family Office or perhaps you are not up for running your own and want to take advantage of our platforms, advisers and connections. You don't need billions to have a Family Office that meets your wealth and portfolio management needs.

We provide a holistic approach to managing your family's financial affairs, ensuring long-term stability and growth. Our experienced team offers a range of services tailored to meet the unique needs of each family, helping you navigate the complexities of wealth management with confidence.

Capabilities

Our Family Office capabilities are as follows. Refer to our Capability Statements to see how we execute to meet your business needs.

- Managing your Balance Sheet
- Cashflow for Families
- Better Reporting: Better Management
- Virtual CFO
- Better Bookkeeping
- Business in the Cloud
- Your Succession Plan
- Estate Planning
- Superannuation Planning

Benefits

The benefits to you are:

1. Comprehensive financial management is no less important than it was when you were running a business. Your family wealth is now your business. We understand that and can efficiently bring together effective reporting of your family office business.
2. The risks are different. Our experience with family businesses and working families mean that we can highlight for you the prudent steps to take to protect the family assets, taking into consideration the situation of the various family members and the different types of assets.
3. The large majority of issues we see in these situations revolve around communication. We can properly advise of the steps to take to ensure that all family members know what they need to know on a timely basis and maintain transparency.
4. Informed decision-making is important. A combination of the right technology, processes and advisory team will work to ensure the steps you take are in the best interests of the office and those around you.

What's next

Contact UHY to discuss how we can best assist you. Connect with us and connect to possibility.