BOULAY

Family Office Services

Whether you would just like assistance with paying monthly bills, or a more comprehensive approach to your financial, tax and estate planning, our professionals work together to ensure seamless coordination of your personal finances. Our team assists high-net worth families, professional athletes, entertainers, family members responsible for elder care and financial management, and many others.

How we help you get there

Our Family Office professionals include CPAs, financial planners, attorneys, insurance specialists, and other advisors and paraprofessionals, who can help you with:

- Bill Payment / Check Writing
- Budgeting and Cash Management
- Tax Preparation and Planning
- Trust or Foundation Administration
- Estate and Financial Planning
- Insurance Oversight
- Wealth Management
- Domestic Help and Payroll
- Lifestyle Assistant
    - Property Management (ex. lawn care, cleaning services, etc.)
    - Private Travel Management
    - Aircraft / Watercraft Management
    - Concierge Services (ex. ordering flowers, gift baskets, holiday cards, etc.)
- Family Philanthropy
    - Multi-Generational Objectives
    - Personal Giving Programs
    - Foundation Trustee
    - Private Foundation Management
    - Governance and Board Development
    - Strategy Analysis and Implementation
    - Foundation and Grant Administration

By expanding our communication channels with you and streamlining access to information, your Family Office team of professionals will be able to efficiently monitor your personal financial situation. Our approach alleviates time consuming monthly bill payment, identifies tax saving opportunities and crafts strategies to help you get there. Not only do we examine your tax consequences, we provide you with a monthly reconciled report containing results and recommendations — all at a surprisingly low cost.

To learn more about Family Office Services, please contact us at learnmore@boulaygroup.com for a free consultation. We look forward to working with you.