

FAMILY OFFICE SERVICES



LBMC Family Office Services

A SERVICE OF LATTIMORE BLACK MORGAN & CAIN, PC

Created by very successful families nearly a century ago, the Family Office concept has been historically reserved for only a privileged few. However, in our age of “instant wealth,” we have seen an increased need for management of complex financial affairs with wealthy individuals and families. LBMC’s Family Office was created to help address these needs.

About LBMC Family Office Services

LBMC Family Office is comprised of a group of talented professionals who provide comprehensive professional services to high wealth families. These professionals are experienced in the areas of accounting and tax services, estate and trust matters, investment advisory services, philanthropic issues, insurance services and retirement planning. In all these areas, we stay in close contact with our clients’ banks, attorneys, brokers and other advisors.

The Family Office works closely with families to understand each one’s special situation, concerns and goals. Utilization of the LBMC Family Office provides clients with their personal CFO to handle their day-to-day financial affairs, allowing them to spend time on things most important to them.

With the LBMC Family Office you have the option to choose any or all of the services we provide based on your special situations concerns and goals. Our goal is to help you manage, preserve and build your wealth - allowing you to be in control of your financial affairs. At the same time, our services allow you to concentrate on those things most important to you - your business, family, travel or philanthropic activities.

We relieve you of the often stressful and time consuming complexities of bill paying, income tax planning, tax return filings, estate planning, investing, gifting, and protection of your assets.



A comprehensive description of services is on the reverse side.



Asset Protection & Insurance Services

Wealth protection planning; Life insurance planning; Disability insurance planning; Review and recommendations of personal insurance including home and auto, and major assets such as boats and planes.

Investment Advisory Services

In-depth evaluation of current portfolio; Investment strategy development; Asset allocation planning; Portfolio manager searches, due diligence & selection; Investment Strategy implementation; Integration with tax and estate planning; Daily web access to account information; Monitoring and reporting investment performance on a monthly or quarterly basis.

Tax Planning & Compliance

Tax minimization planning; Tax return preparation; Integration with investment strategy; Estate planning; Management of tax audits.

Accounting & Reporting

Budgeting; Personal accounting services; Financial statement preparation; Cash flow planning; Family banking and borrowing; Trust & partnership accounting; Business consulting; Private Foundation accounting.

Estate, Gift, Trust & Succession

Estate and gift planning and consulting; Assistance with wills and trusts; Tax return preparation for estate, gift and fiduciary tax returns; Charitable planning; Business succession planning; Wealth accumulation, preservation & distribution strategies; Family wealth education; Family meeting coordination; Integration of estate planning techniques with tax and investment strategies; Asset protection strategies including LLC's and Family Limited Partnerships; Valuation Services.

Philanthropic Services

Administration of private foundations; Coordination of resources for grant making; Review, selection and monitoring of recipient organizations; Support services for charitable activities; Implementation of strategies to maximize tax benefits of charitable gifts.

About Lattimore Black Morgan & Cain, PC

Lattimore Black Morgan & Cain, PC (LBMC) is one of the Southeast's most prestigious accounting and business consulting firms. Our Firm is dedicated to delivering the ultimate in client service while also providing our clients with comprehensive array of financial services. As the largest firm in Tennessee, LBMC has built a strong reputation for excellence.

LBMC was recently ranked 7th largest in the Southeast by *The Practical Accountant* and 45th in the nation by *Inside Accounting Report*. The Firm is a member of the Leading Edge Alliance, an association of large regional accounting and business consulting firms across the United States.

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