

Business Management

Our Business Management practice is tailored to meet our clients' needs for simplicity, financial controls and structure in their lives. We understand the desire to simplify the complex issues of high net worth individuals. We have extensive experience providing business and wealth management services to high net worth individuals, their families, family

businesses, and foundations. Our clients include business and entertainment executives, entrepreneurs, performance artists, sports figures, trust fund beneficiaries and other affluent individuals. The service we deliver allows our clients to live their lives secure with the knowledge that the complex details are in the hands of trusted advisors.



Concierge-Style Services:

- Personalized CFO Services
- Financial Reports and Book-keeping Services
- Charitable Giving
- Succession Planning
- Income Tax Planning and Preparation
- Estate Planning
- Analysis of Business Transactions
- Litigation Support Consulting
- Royalty & Participation
- Analysis & Audits

Personalized CFO Services:

- Lifestyle Planning, Cash Flow Budgeting and Management
- Financial Performance Review
- Insurance Analysis and Risk Management
- Contract Review and Negotiations
- Strategic Planning
- Technology Review and Planning
- Major Assets Purchase/Sale Review Analysis