Wealth Planning Network
Family Office Services

Where Your Lifestyle

And Legacy Come First

About WPN Family Office Services

- Wealth Planning Network Family Office Services offers an Opportunity for you to manage complicated financial and life management affairs most effectively through one trusted objective resource.

- The Family Office Services Team is backed by ethical, sound management that as earned us a long standing reputation for excellence in our respective professions and especially in the financial services industry

About Our Family Office Services

- Independent, objective advice on a broad range of multi-disciplinary wealth management issues.
- Every client is served by a team of seasoned professionals with outstanding credentials and years of specialized, hands on experience.
- Our respective professional team members includes experts in wealth counseling, accounting, taxation and financial management who are committed to providing exceptional service and maintaining long-term client relationships.
- We combine an understanding of each family's goals and values with insightful advice and superior execution to help ensure the preservation of the family's current lifestyle and the continuation of it's legacy.

Seamless Coordination of Services

- After formulating a comprehensive view of your entire financial picture and needs, we then develop a sophisticated plan to manage the many aspects of your wealth and to determine each team member whom will be responsible in assisting you in implementing , monitoring and report your progress.
- Our insightful research, comprehensive advice and direction will identify appropriate service providers to meet your varied needs, enabling you to make optimal, well informed decisions about which providers to engage. We will then execute on those decisions and handle all the administrative tasks on a daily basis, providing seamless delivery of service.

Seamless Coordination of Services

- Integrated Wealth Management
  Sophisticated Planning, Multi-Generational Wealth Transfer, Tax Minimization Strategies

- Investment Consulting
  Consolidated Reporting, Asset Allocation Optimization Investment Manager Selection and Oversight, Tactical Rebalancing

- Financial Management Services
  Cash Flow Management, Budgeting, Financial Plans, Bill Payment and Payroll Services

Seamless Coordination of Services

- Tax and Accounting Services

  Tax Planning, Return Preparation, Tax Compliance, Financial and Investment Accounting, Tax Authority Examinations

- Risk Management

  Records Retention and Storage, Business Succession, Insurance Consultation, Family Security and Wealth Preservation

- Consolidated Reporting

  Customized Comprehensive Reports, In-house Report Generation

Investment Consulting

We believe that investment consulting is a collaborative process with each of our clients. Together we will:

- Analyze your current investment portfolio.
- Develop a comprehensive investment policy statement that centers on your personal parameters and risk tolerance.
- Help to ensure that your strategic asset allocation plan is optimized through the engagement of successful investment managers.
- Provide performance oversight to ensure that your portfolio is achieving your desired returns for income and long-term growth