PKF

Funds and Family Office

New York | London | Edinburgh | Dublin

Family Services

www.pkffundsfamily.com

How we can help

Wealthy individuals, multigenerational families, successful business owners and their key advisors turn to us for a personalised suite of services selected to reflect discrete preferences and priorities.

The very things that make a family special are often what make the oversight of its financial and personal affairs problematic; there is no single solution that works best for everyone. Successful businesses and significant wealth can add complexity to the family dynamic, amplifying issues and creating unexpected challenges. A professional partner with the right credentials and infrastructure can help ensure that intelligent plans are developed, proven processes followed, and desired outcomes achieved. PKF Funds and Family Office is that partner.

Why us

PKF Funds and Family Office brings together experts from across PKF, the global accountancy network, with an on-the-ground presence across the globe. Our clients value us as business people who provide sound advice that helps them grow their investments.

With unparalleled experience, specialised expertise, dedicated resources and enterprise-level accountability, we deliver the solutions that meet a full complement of planning, reporting, financial and lifestyle issues.

- **Comprehensive, streamlined service** – Our clients are busy so they appreciate a single point-of-entry to our extensive capabilities for supporting the organization, oversight and stewardship of significant wealth.
- **A trusted adviser** – Carefully assembled from family offices, family businesses, financial services businesses and law firms, our teams have experience on both sides of the table during discussions and negotiations. This insight allows us to be a tireless adviser, bringing balanced and objective counsel to each relationship.
- **Confidence through controls** – PKF's heritage in tax and audit work gives us a special advantage when it comes to mitigating risks reliably, efficiently and compliantly. We develop customised governance protocols to provide rigour and oversight.
- **Tech-enabled for ease** – Organized and accessible information is an essential part of well-managed finances. With each family's needs in mind, we design private client portals that help clients and their advisors securely connect with each other and monitor progress using state-of-the-art technologies.
- **Depth that resonates** – Combining our in-house professionals and extensive network of third-party specialists, we pair industry-specific expertise with strengths in accounting, tax planning, investment oversight, philanthropy and family governance.

This helps to explain why we currently work with more than 50 families with assets in excess of $100 million.

Industry recognition

'Best Multi-Family Office, Client Service (over $2 billion)'
Private Asset Management – 2018

'Best Tax Advice'
Family Wealth Report – 2017 & 2018

'Best Private Client Audit Firm'
Private Asset Management – 2017

'Best Reporting Solution'
Private Asset Management – 2016

Our services

WEALTH TRANSFER

- Wealth transfer strategies
- Estate, gift and trust planning
- Consulting and statutory accounting for trustees and conservators
- Complete trust and estate administration
- Asset protection planning
- Retirement Planning

TAX

- Strategic tax consulting and planning
- Preparation of returns for individuals, businesses and trusts
- Sophisticated tax mitigation and advanced planning strategies
- Representation before tax authorities
- International tax compliance and consulting

FINANCIAL MANAGEMENT

- Financial modeling, cash management and budgeting
- Bill payment, vendor management and bank reconciliation
- Employee management, payroll and benefits administration
- Document and contract management
- Liaison with lawyers, investment advisors, insurance brokers, banks and other providers

LIFESTYLE SUPPORT

- Maintain personal and real property records
- Review and monitor insurance: life, health, disability, property and liability
- Comprehensive and customized concierge services
- Coordinate healthcare, private security, estate management and major acquisition and divestitures

CUSTOM REPORTING & ACCOUNTING

- Consolidated financial lreports and net worth statements
- Reporting to partners and family members
- Internal control reviews and compliance
- Outsourced accounting and CFO services
- Corporate, partnership and statutory

CORPORATE

- Full statutory audit service
- Expertise in financial services
- Pioneering the use of data analytics to provide greater comfort and understanding.
- Audit

PHILANTHROPY & IMPACT

- Philanthropic mission development
- Family legacy planning
- Tax returns and compliance for charitable trusts and private foundations
- Integration with tax and investment strategies

INVESTMENT MONITORING & OVERSIGHT

- Investment aggregation, performance reporting and risk metrics
- Manager due diligence and evaluation
- Fee analysis and verification
- Investor mandate compliance

ADVISORY

- Succession planning
- Valuation services
- Transaction advisory
- Risk consulting
- Insurance oversight
- Forensic and litigation services
- Family office structuring
- Best practices consulting

FAMILY GOVERNANCE

- Family office audit and best practice
- Family communications
- Next generation engagement
- Family governance and planning
- Next generation education

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PKF FUNDS AND FAMILY OFFICE

Contact us

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