



**Boeckermann
Grafstrom
Mayer**

Family Office Services

Whether assisting with paying monthly bills or providing a more comprehensive and holistic approach to your financial, tax, and estate planning, our team of **Family Office Services** professionals at **Boeckermann Grafstrom & Mayer** work together to ensure seamless coordination of your personal and business finances. Designed to provide guidance and oversight of long-term planning as well as day-to-day financial needs, we will serve as your trusted advisor, being both independent and objective in our work and the serving of your interests. Through our **Lifestyle and Family Management Services** we provide management and support of the responsibilities associated with running your household or keeping your family organized.

SERVICES

We assist high-net worth families, executives, professional athletes, entertainers, and many others. Our services, which are available à la carte, are completely customizable to meet your unique needs, preferences, and budget, while giving you the expediency of having all your affairs managed under one roof.

To assist with your financial and business needs, our team of Family Office Services professionals is comprised of CPAs, wealth advisors, trust and financial advisors, attorneys, insurance specialists, and others, who can help you with:

- Asset Tracking
- Bill Payment and Expense Reimbursement
- Budgeting and Cash Management
- Contract Reviews
- Hiring Domestic Help and Payroll
- Estate and Financial Planning
- Insurance Oversight
- Tax Preparation and Planning
- Trust or Foundation Administration
- Wealth Advisory

Designed to save you time and simplify your life, our Lifestyle and Family Management Services will handle the details and responsibilities that come from leading a busy life, allowing you to focus on the activities you value most. We will be your trusted advisor that knows you, your affairs, and your preferences. Through our Lifestyle and Family Management Services we offer support that will become invaluable to you. Services include, but are not limited to:

- Aircraft and Watercraft Management
- Appointment Setting
- Concierge Services
- Education Assistance
- Event Planning
- Property Management
- Service Provider Due Diligence
- Special Projects
- Travel Research and Booking
- Vehicle Management and Maintenance

We offer a complimentary initial consultation to discuss your needs.

CONTACT:

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