Ready To Look At Your Finances in **A New Way?**

Your life may be complex, but your finances can be organized and simplified.

For the high net worth individuals and families who turn to Geller Family Office Services LLC, whether they are successful entrepreneurs or well-established individuals managing the financial ramifications of life events, one thing remains constant: They are busy people who need timely access to accurate information and unbiased advice to help them achieve their goals.

If you are seeking a team with the financial expertise, objectivity and administrative skills to relieve you of some of the myriad tasks associated with managing your wealth, Geller Family Office Services is the right firm. Your financial reports delivered in a simple, easy to understand format, organized around your personal goals, can make your time more productive.

As your advisor, we will listen, help you define a strategic plan, objectively implement it, and then measure results as they relate to your goals. As part of this process, much like a personal CFO, we can coordinate the activities of your other professional advisors so that their counsel is aligned with your strategies and life goals.

Are you ready to simplify and enhance your life?

Geller Family Office Services is the choice of wealthy individuals and families seeking:

- An advisor that understands your goals and can creatively solve problems.
- Timely, consolidated analyses organized to support financial decisions.
- Objective, professional advice about what will best fit into optimized asset allocations and estate plans.
- Coordination of the activities of all other advisors. This role of communications coordinator is critical since the best legal or financial advice may be useless if it is received in a vacuum, or misaligned with your goals or financial strategy.
- An answer to the question, “How am I really doing?”

Do You Need a **Family Office?**

In addition to expertise, managing wealth takes time, a commodity in short supply for those whose diverse assets, businesses, and personal lives place competing demands on the 24 hours available each day. Without the time to sift through piles of data in search of actionable information, you may have a feeling that things are not quite right.

If you are looking for sophisticated advice and oversight for tax, investment or financial planning, Geller Family Office Services is a wise choice. On the other hand, if you simply want consolidated investment reporting and financial statements, Geller Family Office Services can deliver them accurately, efficiently, and on a timely basis, leveraging our investment in technology.

The comprehensive scope of our services and experience allows us to say, “Yes, we can take care of that”, regardless of how broad-based or singular your needs may be.

You're in **Good Company**

Geller & Company was founded in 1984 with a mission: to help our clients achieve their goals. Since then we have grown to be an industry leader in business, finance, accounting and tax solutions. With our more than 350 people, we are the outsourcing choice of high net worth individuals and families, private equity firms, emerging growth, middle market and global organizations across many industries, supporting, or in many cases functioning as the CFO. As we have expanded our services and talent over the years, we continue to strive to treat every client as if he or she were our most important client. Geller Family Office Services LLC, a federally registered investment adviser, is a wholly owned subsidiary of Geller & Company LLC. As a client of Geller Family Office Services, you will benefit from the collective intelligence of all of our financial professionals, our sophisticated technology, and best practices honed over two decades.

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Why Choose

Geller Family Office Services LLC

Choose Us for Our:

Strategic Ability and Acumen

We know how to listen, understand what you want to accomplish over the short and long term, and then translate your vision into a comprehensive, proactive strategy.

Objectivity

We have no conflicts of interest. Our sole source of revenue is client fees, ensuring complete objectivity in the recommendations we make. In seeking solutions on your behalf, we accept no commissions or fees from third parties.

Culture

Our culture fosters authenticity, accountability, pride in our work and care for our clients. This is reflected in our high retention rates, both for our people and for our clients. As we grow, we continue to carefully select team members who are interested in people, naturally curious, and creative in areas beyond their professional lives.

The qualities we demand of ourselves mirror those our clients expect: integrity, depth of knowledge, unimpeachable respect for privacy, a strong work ethic, ability to execute, and access to quality outside resources as needed. The measure of our success is how well we achieve the goals we set with our clients, and how often we exceed them.

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Reputation

We have been working with high net worth individuals and families since 1984. We are broadly respected in the industry, and many of our referrals come from our clients and their other advisors.

Change Management Skills

We understand that life events can bring with them financial upheaval and the need for sound advice and advocacy from a trusted expert source.

Experience and Expertise

Our staff of CPA, CFA and CFP professionals have decades of experience with a broad range of issues that wealthy individuals confront, allowing us to respond quickly to your unique concerns.

Confidentiality

Our culture, systems and practices all focus on complete security and confidentiality, ensuring your privacy.

Our Comprehensive Suite of **Services** for High Net Worth Individuals and Families Includes:

Financial Planning

- A clear picture of your current financial situation
- Comprehensive financial planning and projections
- State-of-the-art portfolio analyses
- Insurance planning and evaluation
- Balance sheet management
- Risk management
- Customized financial decision support tools
- Analysis of options, restricted stock and other complex financial instruments

Investment Planning, Oversight and Reporting

- Establishment of strategic asset allocations and investment guidelines
- Introduction to and/or evaluation of investment advisors, consultants and managers
- Consideration of relevant tax and estate planning implications
- Preparation of consolidated portfolio reports
- Ongoing performance monitoring and re-balancing of asset allocations

Income Tax Planning and Preparation

- Sophisticated tax-minimization strategies
- Preparation of individual, corporate, foundation, partnership, fiduciary, and gift tax returns
- Transactional planning and structuring
- Representation before tax authorities

Estate Preservation and Legacy Planning

- Wealth preservation and distribution strategies
- Succession and philanthropic considerations
- Coordination with other professional advisors
- Integration with income tax and investment strategies

Cash Management, Financial Reporting and Other Recordkeeping

- Cash flow planning and projections
- Bill payment and bookkeeping
- Domestic payroll and payroll taxes
- Periodic cash flow, balance sheet and other financial reports
- Medical claims processing and follow-up
- Maintenance of private investment records

Looking **Beyond Services** to People

When your due diligence is completed and you feel confident about our resources, our expertise and our ability to execute . . . when your questions are all answered . . . and when concerns about privacy and security have been assuaged and you are ready to make a decision . . . business becomes personal. We believe that our people are our greatest strength because we care about our clients.

Knowing that your situation must be addressed individually, we invest the time up front to build a relationship with you, understand your finances, your needs, your concerns and your goals. It is no surprise that many clients describe their team at Geller Family Office Services as “extended family” and that we are typically the first place they call when there is a problem to be solved or a concern with which we can help.

At Geller Family Office Services, you are assured that the team responsible for your finances is guided by integrity, intelligence, and an inimitable, passionate focus on helping you achieve your goals.

We invite you to learn more about Geller Family Office Services.

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