



Family Office Services

Overview

Regarding your family office, are you getting useful information from your accountant to keep it running at peak efficiency? What is your cash flow position? Are you in compliance with federal, state, and local regulatory agencies?

At BPM, we have the answers to all these questions and more. We evaluate the needs of new and established family offices, then provide solutions to maximize the efficiency of their financial reporting systems. These services apply to individual and family offices of all sizes and range in complexity, from augmenting in-house financial staff to functioning as interim staff. Overall, our goal is to develop and meet your family's financial reporting requirements while maximizing your existing resources.

The Services We Offer Include:

- Outsourced accounting services
- Tax preparation and planning services
- Quarterly and annual compliance reporting
- Internal control analysis
- Payroll, sales tax, and property tax preparation
- Accounting staff training
- Forecast modeling and cash flow management
- Design and implementation of Client Managed Accounting Systems

Contact

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