MULTI-FAMILY OFFICE SERVICES

YOUR FAMILY'S FIDUCIARY AND PARTNER

Over the years, your family's financial complexity has increased, and you wonder if your family is making the right financial decisions. You seek an advisor who can help answer those questions, organize your wealth and objectives, and deliver high-touch service to meet your comprehensive needs.

For over two decades, SJS has consulted with families like yours. We will help develop and execute strategies to make sure you are preparing properly for the life you want to live. By coordinating estate, tax, accounting, and legal strategies, we help you grow, protect, and preserve your family's wealth.

We start with your family's goals and concerns. We then complete a comprehensive assessment of your family's financial picture and set into place the strategies to help keep moving toward your family's goals while preserving your family's legacy for future generations.

In this way, we strive to free your family from the burden of worrying about finances so you all can stay focused on the things you all care about most.

COMMON QUESTIONS

- Does my family need multi-family office services?
- How do I preserve and protect my family's wealth?
- How can I simplify life for my family?
- How do I know if my family has the right plan in place to prepare future generations?
- How can my family prepare for the future and still enjoy life today?
- Is my family paying too much in investment management fees? Could we save by combining family assets?
- How can multi-family office services make life more enjoyable and fulfilling for my family?

HOW WE HELP

Our goal is to help you and your family make good financial decisions. We can help you:

- Create a legacy plan to optimize your family's lives and plans for future generations
- Build a cash flow strategy that takes into account your family's income sources and expenses, and incorporates lifestyle goals
- Coordinate estate, tax, accounting, and legal strategies to help ease your worries and free you to focus on the things you care about most

WHAT YOU RECEIVE

- Client-first philosophy that "You come first. All the time. Every time." It isn't just a slogan. It's how we live our lives. It's how we were raised. Our team provides major money center investment experience to you no matter where you live, where you work or when you need it.
- As a Registered Investment Advisor (RIA), SJS is duty-bound to serve as a fiduciary, putting your interest first.
- The support of a team of professionals, with each team member applying their strengths to your family's financial plan.
- MarketPlus Investing®—our proprietary investment process, which incorporates academic advances in portfolio design with SJS' 25-plus years of investment experience to help your family achieve your specific financial goals through personalized investment portfolios built for cost efficiency and based on your long-term goals.
- A secure and personal MySJS online portal with 24/7 access for tracking goals, account balances, investment progress, financial statements, and tax documents.

SERVICES

- Legacy planning
- Lifestyle goals
- Investment management
- Cash flow and risk management
- Tax and estate coordination
- Accounting and insurance consultation
- Alternative and private investing (sourcing, monitoring, structuring, reporting)
- Specialty lending consultation
- Family foundation consultation and trust
- Family engagement
- Reporting services
- Gifting strategies
- Philanthropy planning
- Future generation education

How Can We Help Your Family?

Contact us to discuss your family's situation.

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