

Business Management & Family Office

RELATED SERVICES

Gift & Estate Tax
Valuations
Tax
Trusts & Estates
Valuation Advisory
Services

INDUSTRIES

High Net Worth
Individuals and Family
Offices
Media & Entertainment

PROFESSIONALS

Connie Cheung
Tom Firestone
Mara Hofman
Cathy Kleineahlbrandt
Julie C. Miller
Michael Ohrt

Partner Led. Integrated Approach. Manage & Protect Assets and Personal Wealth

High net worth individuals and families, and family offices require business managers that understand how to manage and protect personal wealth. Asset protection and value preservation are the financial objectives of high net worth individuals and families. Far beyond bill paying, budgets, and forecasts, the business managers at HCVT provide integrated solutions that protect assets and preserve value. Partner led, our team focuses on the right issues, and our integrated business management service approach includes working with you and your other advisors. Using the appropriate strategies and risk management, we help you formulate current and long-term goals, and our services are tailored to help you achieve those goals. Understanding your investment strategies and risk tolerance is foundational to our service delivery. Our deliverables are not cookie-cutter; they are not *one size fits all*. Your team will develop deliverables that work for you—providing clear and meaningful data that helps keep you on track, manage risk, and achieve your desired goals. Working with business managers that understand the importance of confidentiality and trust is a key factor for high profile individuals and families in selecting a business manager or family office advisor. At HCVT, privacy is embedded in all of our processes.

Working with your HCVT team, you will benefit from the depth of the firm's resources. Whether navigating the increasingly complex tax environment, domestic and international, due diligence on a proposed acquisition, or gift and estate tax valuation, your business manager will tap the right resource to provide information and guidance to help you make an informed decision. Our services are comprehensive and tailored to you.

Our services include, but are not limited to the following:

- Banking, including reconciliation of accounts, credit facilities, deposits, and bill paying

- Analysis of personal and business cash flows
- Cash management, budgeting, and financial planning
- Financial statement preparation
- Risk management and analysis of insurance coverage
- Preparing and monitoring capital commitment schedules
- Reconciliation of activity from flow-through entities
- Assistance with the purchase, financing, and monitoring of major assets
- Analysis of the tax and financial implications of aircraft/yacht ownership
- Accounting for aircraft and yachts
- Payroll and coordination of employee benefits
- Optimizing the tax efficiency of charitable contributions
- Tax planning and preparation
- Retirement planning
- Estate planning

*HCVT does not sell investment products or receive any commissions or fees from other professional service providers including but not limited to insurance, investment, wealth advisors.

Tax Alerts

California Enacts Elective Pass-Through Entity Tax
July 19, 2021

Articles

Philanthropy for Family Offices
Wealth Wise Q1 2016, February 19, 2016