

# high net worth & family office

## Providing peace of mind.

Katz, Sapper & Miller is dedicated to helping high-net-worth individuals and entrepreneurs realize their individual and family financial goals. Our approach is multidisciplinary, combining expertise in taxation, financial planning, and estate planning.



We understand the issues affecting high-net-worth individuals and families and therefore consider a client's total financial circumstance with a tailored array of services. Our professionals work closely with each client in design and implementation to help address legacy and succession issues impacted by taxes as well as conserve and transfer wealth to heirs and charitable organizations.

### OUR SERVICES INCLUDE:

#### Tax planning

- Federal and state tax compliance
- Tax controversy assistance
- State and local tax planning
- Aircraft acquisition structure and compliance

#### Family office services

- Bill payment and cash or wire transfers
- Individual and entity accounting
- Account maintenance
- Cash management including budgets and cash flow projections
- Asset acquisition services and divestiture services
- Strategic business planning

#### Financial, estate, and gift planning

- Review of estate planning documents
- Trust planning
- Family wealth transfer planning
- Business succession planning
- Charitable giving and philanthropy planning and administration
- Life insurance needs planning and analysis
- Education planning
- Coordination with other advisors

Contact us to learn more about how our personalized services can benefit you and your family.