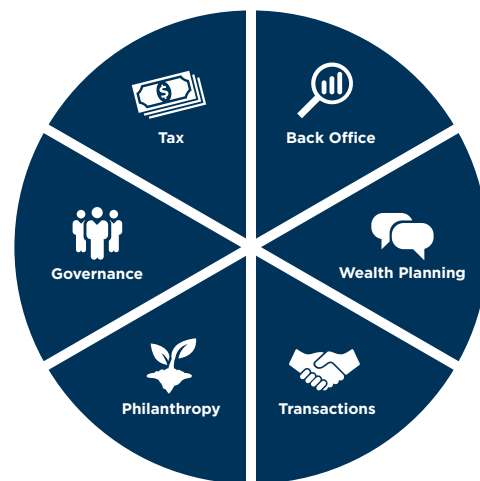


high net worth & family office

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

Developing innovative strategies to help minimize tax liability

- Federal, state, and local tax planning and compliance
- Entity selection and structure
- Tax controversy assistance
- Aircraft acquisition structure and compliance

Wealth Planning

Creating a comprehensive wealth plan to focus on your future legacy

- Comprehensive family wealth planning with coordination of all outside advisors
- Tax-efficient family wealth transfer planning
- Business succession planning
- Review of estate planning documents

Governance

Providing structure for family office operations so you can focus on the future

- Assist families with formalizing their governance structure to codify their vision, mission, and values
- Coordinate family meetings and participate in meetings as needed
- Develop the next generation through education and coaching

Back Office

Providing support to make the day-to-day more efficient

- Cash management, including budgets and cash flow projections
- Specialized reporting tailored to client needs
- Bill payment and cash or wire transfers
- Coordination of services needed for loans and financings

Transactions

Making the most of every deal

- Financial due diligence
- Tax structure optimization
- Post-transaction audit and tax services
- Valuation
- Corporate development advisory

Philanthropy

Maximizing the impact of your charitable giving

- Create a strategic giving plan that reflects the client's vision, values, and interests
- Determine the optimal charitable entity structure(s)
 - Charitable lead trust
 - Charitable remainder trust
 - Public or private foundation
 - Donor-advised fund
 - Remainder interest in personal residence or farm
- Integrate charitable planning into the gift and estate planning strategy

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