DISCUSSION OF FAMILY OFFICE SERVICES

Championship Financial Advisors provides an array of personal financial services designed to simulate a comprehensive personalized treasury function. In the wealth management industry, this compilation of services generally is referred to as the Family Office platform.

The Family Office is geared toward facilitating current financial statements, maintaining current tax reporting information, formulating and executing sound investment and wealth planning strategies, producing accurate investment performance analysis, achieving excellent credit scores and generating detailed revenue and spending reports that enable clients to better grasp their present and future financial condition.

Below is a sampling of the detail-oriented tasks that are undertaken on a daily, weekly, monthly, quarterly or annual basis by the Family Office:

1. Analyzing domestic and global economic and social trends
2. Ensuring timely filing of all tax returns
3. Evaluating asset purchases, asset sales and financing strategies
4. Evaluating insurance coverage
5. Facilitating wire transfers and large cash withdrawals
6. Filing and maintaining records and permanent documents
7. Maintaining dialogues with client’s accountants, attorneys, bankers and insurance agents
8. Managing and valuing client’s asset accounts and tabulating interim performance
9. Meeting with clients to discuss any and all aspects of current and future wealth management
10. Meeting with client’s family members to discuss specific financial situations
11. Monitoring bank accounts for transaction activity and possible fraud
12. Monitoring credit card accounts for transaction activity and possible fraud
13. Paying all bills on a timely basis
14. Probing for estate planning deficiencies
15. Reconciling all bank accounts
16. Reconciling all credit card accounts
17. Reporting on the performance of client’s asset accounts under direct management
18. Updating financial statements
19. Updating revenue and spending reports
20. Updating tax reporting information

The Family Office service package in its entirety ensures a seamless and highly-efficient approach to wealth management. The client pays a negotiated flat monthly fee that is determined by the scope and complexity of the services to be rendered.