Private Client Services

Partner with Aprio to grow and protect your personal financial legacy.

Your overall wealth is more than numbers — it represents your story, hard work, and aspirations. Since 1952, Aprio's skilled and integrated team has guided individuals and families to preserve, grow, and seamlessly transfer generational wealth.

We empower you to achieve your long-term financial goals in a manner that simplifies your life, while providing you with peace of mind today and confidence in the future. Benefit from a cohesive plan that streamlines decision-making and preserves your legacy and broader wealth goals.

Financial growth and wealth preservation at every life stage

Whether you are building wealth, a high-income earner, own a business, or an established family managing generational wealth, Aprio delivers specific and personalized tax, financial planning and investment management solutions.

Our coordinated approach safeguards your assets and provides clarity to help you achieve your financial goals.

Strategies and planning for complex wealth and tax needs

Aprio's Private Client team delivers a holistic and strategic planning approach. By addressing every aspect of your financial picture, we help you protect and grow your legacy.

Estate, Gift, and Trust Coordination

Streamline every detail to transfer wealth seamlessly while safeguarding family governance and estate administration. Manage trusts, family wealth entities, and charitable vehicles to align with your goals.

Income Tax Mitigation

Achieve income tax savings with customized strategies that align with long-term wealth and financial objectives.

Generational Wealth Transfer

Preserve your legacy with trusts, gifting strategies, and succession planning to protect and grow wealth across generations.

Charitable Giving

Achieve your philanthropic goals through effective charitable tax planning to maximize the social impact of giving and instill your values in future generations.

Wealth Building and Protection

Safeguard assets with comprehensive wealth management strategies that incorporate public and private capital investment opportunities, supporting long-term growth.

Retirement and Cash Flow Planning

Structure income streams, manage savings, and create a roadmap to maintain financial stability throughout retirement, giving you confidence in the years ahead.

Life Transition Planning

Traverse significant life changes, whether planned or unexpected, with support and strategic planning that protect your assets and aligns with your evolving goals.

Personal & Business Financial Management

Bridge the complexities of personal and business wealth with integrated strategies that drive sustainable growth and financial longevity.

Family Office Coordination

Create a lasting legacy through tailored solutions that provide governance, consolidated reporting, and strategic oversight to support multi-generational wealth to your specific family situation and complex structures.

Schedule a consultation with our team.

About Aprio

Since 1952, clients around the globe have trusted Aprio as a premier business advisory and accounting firm. Aprio delivers advisory, audit, tax, managed and private client services to build value, drive growth, manage risk and protect wealth. Learn more at Aprio.com