

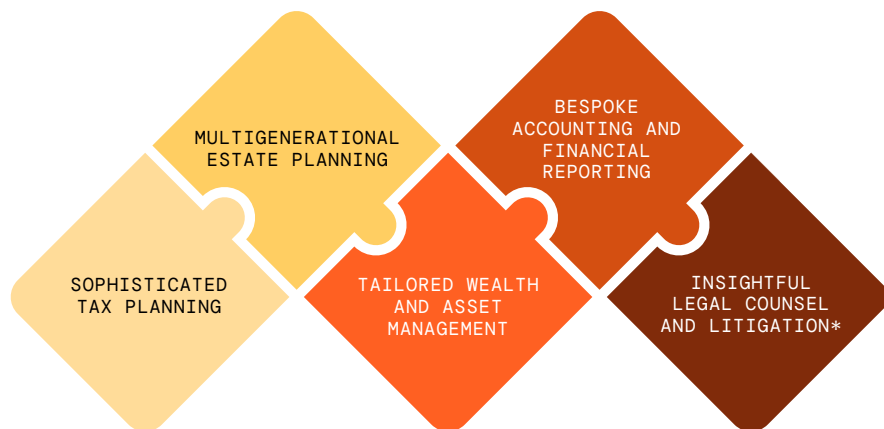


Family Office Services

Benefit from personalized, premium services tailored to your family's needs

Powered by decades of multidisciplinary finance and accounting experience, Aprio provides holistic, strategic support and integrated financial management that aims to preserve your family's wealth for generations to come. Gain access to a team of highly experienced specialists — including accountants, wealth advisors, and attorneys — that will integrate seamlessly with your existing advisors and provide valuable insights on all aspects of your financial life.

Discover a comprehensive approach to family office solutions



Sophisticated tax planning

Leverage Aprio's comprehensive and proactive income tax planning and compliance, including family office tax structuring/re-structuring, international tax planning, estate and succession planning, trust and gift planning, philanthropic planning and more.

Tailored wealth and asset management

Gain confidence with a streamlined, customized and comprehensive approach to your short and long-term wealth goals. Bring together a broad suite of tailored investment solutions, strategic financial and retirement planning, performance reporting, cash flow projections, evaluating risk tolerance and a robust asset allocation strategy that reflects your family's goals and priorities.

Insightful legal counsel and litigation*

When family dynamics and legal complexities collide, Aprio Legal is here to guide you. We help individuals, families, and business owners protect their assets, honor healthcare wishes, and preserve legacies. Our attorneys also advocate for beneficiaries, heirs, trustees, and executors.

Multigenerational estate planning

Our experienced team provides support as your situation evolves, offering clarity and family conflict minimization, asset protection, estate and gift tax efficiency, preservation of family wealth, and philanthropic impact. We'll empower you to establish clear family wealth objectives that keep all your family members and heirs on the same page.

Bespoke accounting and financial reporting

Aprio's powerful accounting and reporting platform can help to seamlessly manage your family's financial performance. Get tailored support when preparing both standalone and consolidated multi-level entity financial statements to maintain compliance and data transparency.



Reasons Clients Choose Aprio

True wealth extends beyond balance sheets. It's about values, vision, and intentional planning. Aprio's Family Office Services offers a holistic approach to managing, growing, and preserving your assets — with every decision guided by what matters most to you.

We recognize that every family office is unique and has different needs and goals for the future. That's why our family office management approach is flexible and tailored to grow with you, no matter how the dynamics of your family change over time. Regardless of your plans for the future, we're here to help you turn complexity into clarity and your goals into generational impact.



Customization

Tailored strategies that address your family's financial, personal, and future priorities



Collaboration

Seamless integration between Aprio, your existing advisors, and stakeholders to help ensure alignment



Confidentiality

Committed to protecting your privacy and managing sensitive information with the utmost discretion

\$5.5B

IN ASSETS UNDER MANAGEMENT

2,800+

APRIO PROFESSIONALS DELIVERING ADVISORY SERVICES ACROSS INDUSTRIES

30+

OFFICES IN THE US FROM COAST TO COAST

Discover family office services, simplified.

Connect with Aprio today and learn more about how we can help you and your family.

LEARN MORE



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. [Aprio.com](https://www.aprio.com)