



Amplify your Legacy with Family Office Services

Simplify your financial complexity with tailored services
and preserve multigenerational wealth.

Aprio 

Passionate for what's next®

Your family's focus. Tailored solutions.

To create a legacy that is built to last, it's important to look beyond the numbers. Aprio's experienced family office advisory team can help you find efficient solutions with peace of mind in knowing your values and wishes are reflected in your family's multigenerational wealth strategy.



Tailored tax planning



Streamline family office accounting and financial reporting



Estate planning



Wealth management



Governance strategies

Gain back valuable time with your family and the things that matter most. Whether you are focused on preserving assets, detailed reporting and consolidation, preparing the next generation, or making an impact through philanthropy, we are here to guide you every step of the way. Gain access to a team of experienced professionals — including accountants, investment advisors, and attorneys — who can provide personalized guidance on all aspects of your financial life.

Discover a bespoke approach to family office management

At Aprio, 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.

Sophisticated tax planning

- Tax compliance and mitigation strategies
- Family office tax structuring/restructuring
- State and local tax, residency and international tax planning
- Philanthropic planning

Outsourced family office accounting

- Accounting and bookkeeping
- Consolidated multi-level entity financial statements
- Capital calls vs. commitments tracking and reporting
- Streamlined bill pay support
- Concierge services

Comprehensive estate planning

- Formal written estate plan or current estate plan review
- Create wills, healthcare directives
- Formation of trusts and family entities
- Asset protection
- Multi-generational planning

Financial planning and wealth management

- Cash flow and retirement planning
- Financial and insurance planning
- Investment/asset management/performance reporting

Wealth with intention. Strategy for generations.

True wealth extends beyond balance sheets. It's about values, vision, and intentional planning. Aprio's Family Office Services team offers a holistic approach to managing, growing, and preserving your assets — with every decision guided by what matters most to you. Regardless of your plans for the future, we're here to help you turn complexity into clarity and goals into generational impact.

Customization

Rely on Aprio's team for tailored family office strategies that address your family's financial, personal, and future priorities.

Collaboration

Enjoy seamless integration between Aprio, your existing advisors, and stakeholders to ensure alignment.

Confidentiality

Feel peace of mind in knowing your family office team is committed to protecting your privacy and managing sensitive information with the utmost discretion.

\$2.5B⁺

in assets under management (AUM)

2,300⁺

firmwide professionals delivering a full spectrum of advisory solutions across institutions

125⁺

years of collective experience serving family offices among Aprio's advisory team

30⁺

offices in the U.S. covering coast to coast



Protect your legacy. Empower the next generation.

As one of the fastest-growing CPA and business advisory firms in the nation, Aprio has helped high-net-worth individuals and families preserve, transfer and grow generational wealth since 1952. Our coordinated, streamlined approach simplifies effective income, estate, tax, investment, and financial planning for wealthy individuals. Discover a better holistic planning and advisory experience.

Preserve what matters
and plan for what's next.

Scan the QR code and
schedule a consultation.



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://aprio.com)

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