Enjoy life with your family

Let us help with your family's personal financial management

KraftCPAs PLLC

Family Wealth Services

With wealth comes responsibility

Being the stewards of your family's wealth is an extremely important responsibility that often requires a significant amount of time and an extensive array of financial and management acumen. For some families, the details related to managing the family's accumulated wealth has grown to be an overwhelming responsibility – a responsibility that takes time and attention away from other business, personal or philanthropic endeavors.

The wealthiest families often have family offices of their own with a complete staff to handle accounting, tax, wealth management and governance functions for the family. However, the cost involved and, in some instances, the expertise needed creates a challenge for many other families.

Now, families have another option – a name that's been known and trusted for almost 60 years – KraftCPAs.

Together with our wholly owned subsidiary, Kraft Asset Management, LLC, KraftCPAs can provide an outsourced solution that's flexible, affordable and focused on your family's needs. There is no "one size fits all" approach to our family wealth services. We design a blend of services that is tailored to match the specific needs of each particular family.

KraftCPAs can help

The benefits of outsourcing to KraftCPAs:

- The range of services and ***depth of expertise*** available through KraftCPAs far exceeds what one or two in-house employees could provide for the family.

- Because we can replace or augment a variety of individual providers, outsourcing to KraftCPAs can provide ***cost-savings*** for the family and increase the ***ease of doing business.***

- As a certified public accounting firm, KraftCPAs adheres to the ***highest standards of quality control, client privacy and confidentiality.*** We are our clients' trusted advisors.

- Kraft Asset Management, LLC is a registered investment advisor (registered with the Securities and Exchange Commission) and, as such, we have a fiduciary responsibility to act in the best interest of our clients. Under current regulatory requirements, not everyone in the financial services industry is held to a fiduciary standard of care. With Kraft Asset Management, your family will be assured that ***recommendations are always made with your best interest in mind.***

Service offerings include, but are not limited to:

- strategic wealth management
- investment planning
  - portfolio design
  - data aggregation
  - performance monitoring/reporting
  - periodic rebalancing
- cash flow management
- tax planning and compliance
- estate planning
- retirement planning
- gift-tax planning
- accounting and reporting
  - bookkeeping/bill paying
  - household payroll
  - financial statements
- electronic document storage and management
- family governance
- risk management
- charitable giving planning and management
- coordination of family's team of professional advisors

The best of both worlds

KraftCPAs provides the best of both worlds – national and international resources typical of a "Big 4" accounting firm, along with the personal service, flexibility and fee structure of a local firm. The family wealth services group is backed by more than 190 Kraft team members with expertise in a wide range of financial, management and technology services.

Kraft Asset Management, LLC is a member of the BAM Alliance® – a nationwide community of more than 140 independent advisors who are also primarily affiliated with CPA firms. This alliance provides us the ability to remain independent and local while leveraging the vast knowledge, resources and strength of other similar firms. In addition, the BAM relationship helps hold down business operating expenses, thereby allowing us to maintain competitive advisory fees which enhances net returns for our clients.

Headquarters

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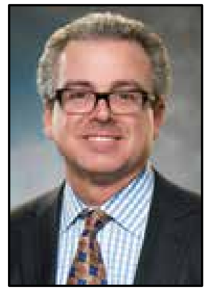
Learn more at

www.kraftcpas.com

www.kraftasset.com

Contacts



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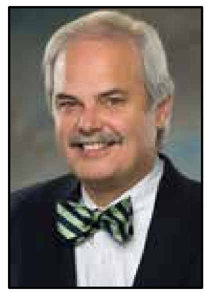
20 years of experience



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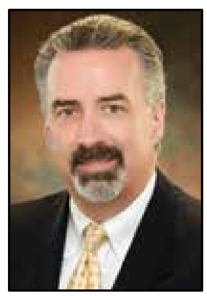

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