



## providing industry-leading family office services

At BGM, our team of accounting and advisory professionals offers bespoke, industry-leading family office services. From our headquarters in Minnesota, we serve clients from multiple locations throughout the US.

As your trusted advisors, we'll deliver services designed to provide guidance and oversight of long-term planning as well as day-to-day needs.

### – Tax, accounting and advisory services:

Whether assisting with paying monthly bills or providing a more comprehensive and holistic approach to your finances, we'll ensure seamless coordination of your personal and business finances.

### – Lifestyle and family management services:

We'll handle the management and support of the responsibilities associated with running your household or keeping your family organized.

### WHO WE SERVE

Our financial and advisory professionals provide confidential, comprehensive family office services to a variety of ultra-high-net-worth individuals and families, including:

- Affluent families
- Art and collectibles enthusiasts
- Entertainers
- Executives and corporate leaders
- Investment professionals
- Philanthropists
- Professional athletes

### THE BGM BENEFIT

At BGM, we believe in going beyond the traditional role of accountant and tax advisor. You'll be assigned a dedicated team and can expect to experience a hands-on approach from your financial professionals. Plus, you'll receive timely and proactive advice and solutions. It's this high level of personalized service that keeps our accounting and advisory firm the trusted choice for family office services.



### connect with an industry advisor

**DANE J. BOECKERMANN**

PRINCIPAL

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### **TAILORED TAX, ACCOUNTING AND ADVISORY SERVICES**

Our financial services are completely customizable to meet your unique needs, preferences and budget. This gives you the expediency of having all your affairs managed under one roof.

To assist with your financial and business needs, our team of family office service professionals is comprised of CPAs, wealth advisors, trust and financial advisors, attorneys, insurance specialists and others. Together, our team will craft a fully bespoke wealth management program that may include:

- Asset tracking
- Bill payment and expense reimbursement
- Budgeting and cash management
- Contract reviews
- Hiring domestic help and payroll
- Estate and financial planning
- Insurance oversight
- Philanthropic giving
- Tax preparation and planning
- Trust or foundation administration
- Wealth advisory



### **HIGH-TOUCH LIFESTYLE AND FAMILY MANAGEMENT SERVICES**

Designed to save you time and simplify your life, our services will handle the details and responsibilities that come from leading a busy life. We will be your trusted advisor who knows you and your preferences.

Delivering invaluable support to free up your time for what matters most to you. Our services include, but are not limited to:

- Aircraft and watercraft management
- Appointment setting
- Concierge services
- Cyber security and risk management
- Education assistance
- Event planning
- Property management
- Service provider due diligence
- Special projects
- Travel research and booking
- Vehicle management and maintenance

**interested in learning more about how we can best serve you?**

**VISIT US AT [BGM360.COM](https://www.bgm360.com)**

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