



## Family Office Services






Tax, Legal and reporting in a one-stop-shop – Deloitte as link between family, company and private wealth









Due to the growing complexity of the legal and tax environment, administrative work increases, making it more difficult for family offices to focus on their core competences. At the same time, the risk of (expensive)

mistakes increases with the growing complexity of the environment. Hence, there is the need to outsource certain activities to external partners and service providers. We understand ourselves as trusted




advisor and as your partner for all tax, legal and reporting duties in order to eventually professionalize the family office. This also ensures to fulfill all legal and tax obligations both nationally and internationally.

### Our service offerings

-  accounting services, preparation of (statutory) financial statements for family-owned businesses and foundations, contract management ("corporate secretarial services")
-  procurement and quality review of accounting and other financial information (information hub)
-  handling, organization and documentation of meetings
-  monitoring, controlling and management accounting, asset-reports, cash flow statements
-  support in budgeting, financial planning and other (management) controlling instruments
-  personal accounting, payroll (advice on employment and social security law), correspondence with authorities, wage tax audits, tax litigation

-  tax advice and ongoing compliance services (annual tax returns, monthly or quarterly VAT returns, capital gain tax registration, ultimate beneficial owner register (WiEReG), etc.)
-  tax and legal services for foundations and trusts, coordination of statutory auditors
-  tax and legal services for all asset classes (business/investment income, financial assets, real estate, alternative investments, art, etc.)
-  tax and legal services regarding international residencies
-  financial advisory, tax and legal services on M&A – transactions (direct investments)
-  central coordination of worldwide advisors
-  next generation: structured wealth and succession planning, inheritance law issues
-  advice on the drafting and structuring of family constitutions

### Your benefits

-  modular outsourcing of administrative activities for family offices ensures concentration on core competencies
-  one-stop shop for accounting, reporting, payroll, annual accounts, tax & legal
-  comprehensive performance of controlling tasks (investment controlling, comparison)
-  transparency through manageable reporting systems
-  cost savings due to standardization of administrative services
-  benefit by seamless cooperation with the lawyers of Jank Weiler Operenyi Attorneys at Law / Deloitte Legal for complex legal issues
-  access to the expertise of the worldwide Deloitte network in international matters
-  professionalisation and institutionalisation of the family office

### Your contacts

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