FAMILY OFFICE SERVICES

HELPING HIGH-PERFORMING FAMILIES REACH HIGHER

Warren Averett Family Office manages your investment portfolio, estate planning, real estate, staff and other provisions for you and your family. We are your family's CFO—coordinating your day-to-day accounting, payroll, taxes, bill payment, charitable giving and succession planning. The more we do for you, the more time you gain to pursue your passions and interests, and the less you have to worry about.

Advising on assets in excess of $3.5 billion, Warren Averett Asset Management is a smart family office choice for families. We are affiliated with Warren Averett, one of the largest CPA and Advisory firms in the Southeast. We are able to leverage a wealth of tax and financial services experience to provide unique solutions to meet your family's needs.

WHY WE SERVE

With one team, you can protect your wealth through comprehensive planning and risk management, make an impact through philanthropy planning, live life to the fullest with a personal financial team behind you and leave a legacy through family education, estate and succession planning.

An old proverb says that there are but three generations from shirt-sleeves to shirt-sleeves. Research suggests that for the overwhelming majority of families with a net worth in excess of $25 million, their wealth is consumed before the third generation receives its benefit. Whether your family's wealth is derived from a significant liquidity event, through generational wealth building or as a result of an ultra-high earner (professional athlete, corporate executive, etc.), Warren Averett Family Office aims to educate future generations and design a plan that will have a lasting impact.

Advise on Assets in Excess of

$3.5 BILLION

HOW WE DELIVER

Your dedicated Warren Averett Family Office team includes at least two senior advisors and a family coordinator. Our team coordinates the delivery of customized services—calling on team members from Certified Financial Planners (CFP) and Chartered Financial Analysts (CFA) to Certified Public Accountants (CPA) and attorneys (JD). We have only a select number of Family Office clients, so that we can provide each client highly personalized attention.

Warren Averett ASSET MANAGEMENT

Learn more at www.WAasset.com

SERVICES INCLUDE (but are not limited to)

Asset Management
Our advisors understand the unique needs of an ultra-high net worth family. Our team works to build a portfolio that meets your growth, risk-management and preservation needs utilizing traditional and alternative money managers.

Estate, Tax & Financial Planning
Our team's diverse background of experience and credentials allows us to provide holistic financial advice. We work with your family's accountants, attorneys, and other advisors to ensure that our advice enhances your family's income tax and estate planning goals.

Client Education & Family Meetings
Our goal is to educate and communicate with members of each generation. We want to emphasize and reinforce the family values that are important to you. We will help you develop a family mission statement and values to guide decision-making for years to come.

Philanthropy Planning
One of the toughest, yet most rewarding challenges for ultra-high net worth families is determining how to best use the family's assets for the benefit of others. With options such as private foundations, donor-advised funds and charitable trusts, our team can help you achieve your philanthropic goals.

Concierge Services
Your family has worked hard for the financial success that you enjoy, and our goal is to help make sure that you are enjoying it! Whether it's purchasing a new home or car, deciding how to finance a purchase or simply booking reservations for the family vacation, relax and let us do it for you.

Cash Flow Management & Recordkeeping
Organization is paramount to the success of ultra-high net worth families. Our team is positioned to receive mail, pay bills and ensure that adequate cash flow is available to meet your family's needs. We also scan, file and organize important documents for easy access when they are needed.

Risk Management Review
Risk management is an important area of financial planning for ultra-high net worth families that is easily overlooked. Annually, our team will coordinate the review of insurance policies you have in place, and make recommendations for adjustments to those policies.

LET US GET TO KNOW YOU AND YOU'LL EXPERIENCE A DIFFERENCE THAT WORKS TO YOUR ADVANTAGE.

Count on: independence, we operate free from quotas, fund restrictions and proprietary products; discipline, a data-and-detail-driven approach with in-depth research and reliable follow through; and a better return on relationships - advisors passionately committed to seeing you and yours thrive.

To find out how we can help, meet our Family Office advisors at www.WAasset.com or call us at 800.759.7857.

Warren Averett
ASSET MANAGEMENT

Learn more at www.WAasset.com