# SNOWDEN LANE PARTNERS

## The Ureña Wealth Management Group

## FAMILY OFFICE SERVICES

We serve as your family's chief financial officer working in coordination with your other advisors to execute strategies and orchestrate the many details that come with a complex financial life as you define and preserve your family's legacy.

## OUR VALUE TO YOU

The result is a higher level of order, structure, clear direction, and confidence as you approach the successful financial future you have always desired to give your family.

## CONTACT


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| YOUR NEED | WE'LL HELP YOU |
|---|---|
| **Goals** | • Gather data and financial records<br>• Create a plan with specific recommendations<br>• On-going calibration of your financial plans to fit your goals.<br>• Provide an annual finanial summary |
| **Financial Organization** | • Develop a personal client website that organizes your financial life by aggregating assets<br>• On-demand reporting of net worth, asset detail and estate flow<br>• Electronic document vault that can be remotely accessed |
| **Cash & Credit Management** | • Foreign Currency exchange<br>• Custom and Securities-backed lending<br>• Treasury Management |
| **Tax Strategies** | • Coordinate with your tax professional on timely preparation and filing of tax returns<br>• Keep records of supporting documents for tax returns<br>• Tax-sensitive asset management including tax-loss harvesting |
| **Estate Planning & Implementation** | • Review existing wills, trusts and powers of attorney<br>• Coordinate with your attorney |
| **Risk Management** | • Determine whether risk tolerance and asset allocation needs are aligned<br>• Communicate investment strategy and decisions with tax planning and estate planning professionals<br>• Review your plan regularly |
| **Investment Strategy & Implementation** | • Determine whether risk tolerance and asset allocation needs are aligned<br>• Communicate your investment strategy and decisions with tax planning and estate planning professionals<br>• Ongoing strategic meetings regarding financial goals |
| **Family Legacy & Governance** | • Philanthropic giving strategies<br>• Generational gift planning<br>• Education of subsequent generation on wealth stewardship |


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