Your Personal Family Office

One relationship. Coordinated specialists. A strategy built around you.

COORDINATED PLANNING ACROSS THE AREAS THAT MATTER MOST

A Family Office helps organize the different parts of your financial life around one coordinated strategy - so tax, investment, insurance, legal, estate, retirement, and business decisions are not made in isolation.

Tax Planning

- Advanced tax strategies
- Charitable structures
- Business tax optimization
- Tax credit opportunities
- Entity planning
- Owner compensation planning
- Retirement-plan tax strategies
- Multi-year tax planning

Business Advisory

- Exit strategy development
- Succession planning that protects family
- Business valuation optimization
- Growth acceleration strategies
- Operational improvements
- Cash-flow planning
- Preparing the business for a future sale

Risk Mitigation

- Asset protection before lawsuits hit
- Insurance gap analysis
- Litigation shields
- Privacy preservation
- Retirement risk analysis

Investment & Retirement Strategy

- Alternative investments
- Tax-efficient portfolio design
- Private market access
- Institutional strategies
- Asset-location strategy
- Coordination with your financial advisor or outside investment-advisory firm

Legal & Estate Coordination

- Trust and estate-planning coordination
- Entity formation and restructuring
- Asset-protection planning
- Family governance frameworks
- Tax-efficient wealth transfer
- Buy-sell agreement coordination
- Estate liquidity planning
- Coordination with attorneys on legal implementation

HOW THE FAMILY OFFICE WORKS

The family office model is a way of organizing and coordinating a client's entire financial life rather than giving isolated advice on one product, one account, or one area of planning.

A family office creates one coordinated strategy around the client's entire financial life instead of treating taxes, investments, insurance, estate planning, and business decisions separately.

The result is better coordination, fewer missed opportunities, clearer decision-making, and a plan designed to preserve flexibility, reduce unnecessary risk, and move the client toward their long-term goals.

LEGACY TAX STRATEGIES

Strategic Tax Planning • Coordinated Advice • Better Decisions

785.430.3717

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The Family Office Advantage

A coordinated approach to complex financial decisions.

THE CHALLENGE

SUCCESSFUL FAMILIES & BUSINESS OWNERS FACE

- ✕ Multiple advisors who do not communicate, creating gaps and redundancies
- ✕ Paying unnecessary taxes because strategies are not coordinated
- ✕ Wealth exposed to avoidable risks because protection structures are incomplete
- ✕ Missing opportunities that require specialized expertise
- ✕ Spending too much time managing different professionals

THE FAMILY OFFICE ADVANTAGE

- ✓ One trusted relationship coordinating specialists around a unified strategy
- ✓ Proactive planning designed to identify tax-saving and growth opportunities
- ✓ Tax, retirement, estate, risk, business, and investment decisions evaluated together
- ✓ Clear communication and ongoing coordination among the professionals involved
- ✓ More time for your business, family, and priorities

ONE COORDINATED VIEW OF YOUR FINANCIAL LIFE

Legacy Tax Strategies helps identify planning gaps, coordinate the professionals involved, and evaluate how tax, retirement, business, estate, insurance, and investment decisions affect one another. The goal is fewer disconnected decisions and a more coordinated strategy built around your priorities.

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