

# PRIVATE CLIENT SERVICES



KBF is uniquely situated to further elevate success. As a Private Client Services client, you will engage with a team of professionals offering customized solutions focusing on strategic tax decision making, tax compliance, estate and multigenerational planning, liquidity and exit planning, philanthropic planning, and family governance.

Our clients receive the education and guidance needed to make informed decisions and successfully navigate the intricacies of a complex planning landscape. We measure ourselves based on your continued and increasing success, and your ability to secure the future for you and your loved ones.

# PRIVATE CLIENT SERVICES



## Goals and Aspirations

We take the time to understand what is important to you, with measured consideration of the tax and non-tax factors that shape your planning goals. Being able to quickly adapt as part of an ongoing planning process is part of our commitment to ensure changes in your particular situation are addressed promptly and prudently.



## Estate Planning

Estate planning becomes crucial for our clients to preserve and transfer their wealth to future generations efficiently. Our team is an intricate part of the process of creating a comprehensive estate plan, establishing trusts, minimizing estate taxes, and ensuring a smooth wealth transfer process according to the client's wishes.



## Philanthropy

We recognize the importance of family philanthropy and values. We help clients engage in purposeful and impactful giving by aligning them with charitable organizations and causes that best reflect their values, ensuring that their donations create positive change and promote social welfare.



## Tax Planning & Compliance

Our clients often have complex tax situations due to multiple income sources, complex investments, and business interests. Our team has extensive experience with sophisticated tax planning and can help manage a client's tax liabilities, navigate intricate tax laws, and ensure compliance with all filing and reporting requirements.



## Liquidity and Exit Planning

Clients looking to the next stage in life following an exit or liquidity event are presented with unique opportunities to mold their family's future, mitigate taxes, achieve philanthropic goals, and plan for needed cash-flow and asset security.



## Multi-generational Planning

Managing wealth across generations can often require the establishment of effective family governance structures and a focus on wealth education. We assist in establishing family offices, providing comprehensive education for family members, facilitating communication and decision-making processes, and ensuring the seamless transfer of wealth and values across generations.

To know more about our Private Client Services, contact Timothy Reaney at [treaney@kbfadvisory.com](mailto:treaney@kbfadvisory.com).

KBF is a rapidly growing professional services firm that offers a comprehensive range of tax, assurance and advisory services. KBF is a recognized leader in Accounting for Income Tax (ASC 740) and GAAP advisory services. KBF serves hundreds of public, private equity-owned and venture-backed companies, as well as select dynamic privately-held businesses.

"KBF" is the brand name under which KBF CPAs - Audit, LLP ("KBF Audit") and KBF Advisory, LLC ("KBF Advisory") provide professional services. KBF Audit and KBF Advisory practice in an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations, and professional standards. KBF Audit is a licensed independent CPA firm that provides attest services to its clients, and KBF Advisory provides tax and business consulting services to its clients. KBF Advisory is not a licensed CPA firm.