GeffenMesher

FAMILY OFFICE

What is a ***Family Office?***

A family office provides customized day-to-day management and administration of a family's financial affairs. Geffen Mesher offers a wide range of services including, but not limited to, advisory services, trust and estate oversight, assistance with philanthropic efforts, and educating the next generation on the family's wealth and legacy.

We utilize our in-house expertise and leverage our network of professionals to ensure that a family's financial well-being is supported in an efficient and effective manner. *We are your financial concierge.*

Who We ***Serve***

- High-net-worth individuals and families (typically between $10 million and $500 million net worth)
- Successful entrepreneurs
- Those who have been provided financial services by a trusted employee who is retiring soon

How We ***Charge***

At Geffen Mesher, we charge our family office clients a monthly flat fee for agreed-upon services, typically in the $1,000–$5,000 range. We pride ourselves on our equitable fee structure and dedication to addressing each family's specific needs as they grow and change.

Family Office ***Team***

Michael Lortz | ***CPA, LEED AP***
Tax Shareholder
office 503. 445. 3368
email mlortz@gmco.com

Michelle Hooton | ***CPA***
Family Office Manager
office 503. 445. 3398
email mhooton@gmco.com

Shae Manrique
Family Office Assistant
office 503. 445. 3402
email smanrique@gmco.com

Alexis Burchett
Accounting Associate
office 503. 445. 3450
email aburchett@gmco.com

888 SW 5th Avenue, *Suite 800* Portland, Oregon 97204 | *Office* 503. 221. 0141 | *Fax* 503. 227. 7924 | **gmco.com**

GeffenMesher

FAMILY OFFICE SERVICES

1. Tact, Timing, & Transparency

We customize our services in order to accomplish your specific objective, and we do so in a way that is fair, time-sensitive, and respectful.

- Remaining respectful of the family dynamic
- Knowing our role (never overstepping boundaries)
- Being available to individual family members
- Being mindful of the delicacy of inter-family relationships
- Providing fast and accurate response to sudden needs, emergencies, etc.

2. Traditional Services, Modern Needs

We approach our work in a way that is both systematic and personable. We provide solutions that address your exact wishes in the moment and as they change.

- Mail processing
- Bill payment
- Cash management
- Household payroll and reporting
- Company stock and stock options monitoring
- Document and records management
- Medical insurance
- Charitable contributions tracking
- Family asset (including collectibles) analysis

3. Tax & Accounting Support

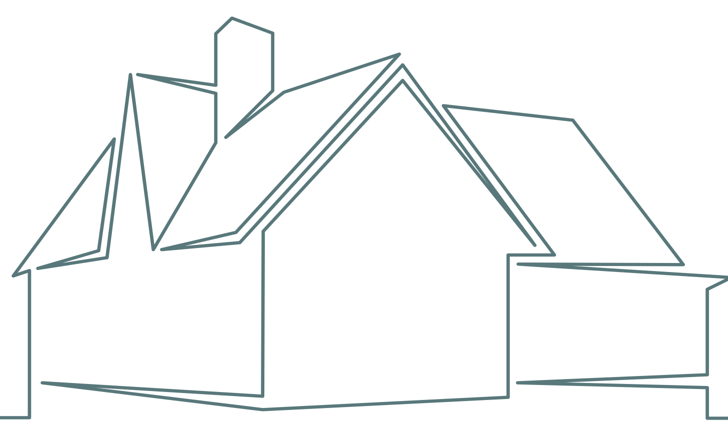
In working with Geffen Mesher's family office, you'll also benefit from having a team of experienced tax planning professionals at your service as needed.

- Preparation of personal financial reports and statements
- Analysis and reporting
- Bookkeeping and accounting
- Monitoring of tax basis and fair market valuations
- Gift tracking

4. Trusted Advisor, Liaison & Partner

With change comes new opportunities for families like yours. Working closely with you, we are prepared to take the lead on important conversations when you need us to do so.

- Coordinate with an investment management team to track investments and manage tax efficiency
- Coordinate with legal counsel to establish and maintain charitable trusts and private foundations, including estate tax planning and compliance
- Strategically plan, set goals, and lead/ coordinate special projects



888 SW 5th Avenue, *Suite 800* Portland, Oregon 97204 | *Office* 503. 221. 0141 | *Fax* 503. 227. 7924 | **gmco.com**