Family Office Administration

Family Office Administration encompasses a broad range of concierge services curated for individuals and families with significant assets and complex financial lives. We make the mundane, as well as the complex, flow smoother, giving insight into your finances without requiring you to participate in the daily tasks of bill pay, cash tracking and budgeting.

Our family office administration group has the experience and knowledge to provide custom solutions to address your unique circumstances. We have a demonstrated track record of success by providing transparent reporting and clear communication.

AS A FAMILY OFFICE ADMINISTRATOR, WE MAY:

- Pay bills and track financial records.
- Assist with tax preparation and filing.
- Pursue and resolve potential billing errors.
- Manage and oversee household payroll.
- Evaluate and forecast personal budgets.
- Manage multiple households.
- Support and track charitable giving and philanthropy.
- Assist with personal projects as needed.

WE TRUST Company
PROFESSIONAL FIDUCIARY SERVICES

Frequently Asked Questions

What is a Family Office Administrator?
WE Trust Company's family office administrators provide a comprehensive suite of services, including financial tracking and record keeping, tax preparation, philanthropic assistance, and risk management. We serve as the gatekeeper of family financial management, interacting with and reporting on the details that help your household run smoothly.

What is the difference between wealth management and family office?
Family office administration offers a wide range of customized solutions for day-to-day financial details, while investment advisors focus primarily on investment management and financial planning.

What are the advantages of hiring WE Trust Company as your Family Office?
Affluent individuals and families who want to have control over their finances can trust that our team will manage the details. We listen to your pain points and offer options for easing your burden. Delegating these details allows you to focus on enjoying life.

How do I engage WE Trust Company as my Family Office?
We are hired through a letter of engagement that defines the scope of our services and clearly details the mutual understanding of our role.

How do you charge for your work as a Family Office Administrator?
WE Trust Company charges by the hour for Family Office Administration. A fee schedule is available upon request.

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