

# Financial Planning

## **Building Your Portfolio for the Future**

Proper planning provided by First Foundation Advisors can help your portfolio continue to grow to benefit future generations. First Foundation Advisors reviews your investment portfolio regularly to ensure that all of your portfolio guidelines are being addressed. We use a number of customized benchmarks to measure performance for each asset class represented.

## **Financial and Cash Management for Maximum Liquidity**

Many individuals overlook the need to maintain proper cash allocation by budgeting cash needs against cash flows. As part of our services, First Foundation Advisors works with you to plan for necessary cash outlays, to have funds available to reinvest or to have available liquidity for those unexpected situations.

## **The Benefits of Family Office Consulting**

Many families feel that they would benefit by establishing a family office but are not certain where to start. First Foundation offers a range of family office services to streamline your operations and help you leverage financial opportunities.

### **We can help you with:**

- Investment services – to maximize your investment returns while managing risk.
- Review and analysis of insurance – including life, health, disability, property, casualty and liability.
- Financial and estate planning – including trusts, wills and charitable giving.
- Tax planning – to mitigate your tax liabilities, as well as prepare annual tax returns.
- Business planning – including succession planning and executive benefits.
- Information reporting – maintaining books and records for the family while providing specialized reports tailored to the family members' needs.