



SPECIALIZED SUPPORT THAT MATCHES THE COMPLEXITY OF YOUR FAMILY'S WEALTH

Warren Averett brings structure, strategy and trusted coordination to family offices, helping families make thoughtful decisions, protect what matters most and sustain continuity for generations to come.

Managing significant family wealth is like running a business with added personal dynamics. As complexity grows, families need coordinated guidance that aligns decisions, protects relationships and supports long-term goals. From coordinating advisors and overseeing complex financial structures to navigating generational transitions, families need more than traditional accounting support.

When **COMPLEXITY**
increases, **COORDINATION**
matters.

INDEPENDENT COORDINATION

Warren Averett is not a financial advisor and not a registered investment advisor, so your investment relationships remain intact, and you gain a central point of organization that helps every advisor deliver stronger outcomes on your behalf. This independence gives you a more informed view, a more coordinated team and a decision-making environment that stays grounded in your priorities.

THE WARREN AVERETT DIFFERENCE

Warren Averett helps create space to enjoy what you've worked for, so that your wealth serves your life, not the other way around. We help families protect wealth, support meaningful philanthropic goals and sustain continuity. Warren Averett provides specialized support for family offices, helps families design family office structures and evaluates existing family offices to ensure they are still aligned with the family's needs.



COORDINATION ACROSS COMPLEX AREAS

We work alongside your investment advisors, attorneys, private banks and other professionals to ensure decisions are unified—not duplicated.



CONTINUITY AND GUIDANCE ACROSS GENERATIONS

Our advisors help families navigate transitions, educate heirs and align financial decisions with long-term values and goals.



DISCRETION AND DIRECT ADVISOR ACCESS

Work directly with experienced professionals who listen, act and advise with discretion at every step. No layers of bureaucracy. No generic solutions.

FAMILY OFFICE DESIGN

Families with substantial wealth face a level of complexity that often outpaces traditional financial structures. These unique challenges demand a coordinated, intentional approach. Warren Averett helps families design and maintain family office structures that adapt as needs evolve while preserving privacy, discretion and long-term stability.

- Multiple entities and complex tax obligations
- Generational transitions and succession planning
- Philanthropy, governance and legacy goals
- Cybersecurity, privacy and risk oversight
- Coordination among numerous advisors

STRENGTHEN EXISTING FAMILY OFFICES

When a family office is already in place, the challenge shifts from setup to sustainability. Over time, even well-established offices can become siloed, overly complex or misaligned with the family's evolving priorities. Warren Averett helps families take a step back and assess whether their current structure is still serving them—or simply maintaining momentum without direction. You might be seeing inconsistent reporting, unclear roles among advisors or friction between generations around decision-making.

We help families take a strategic pause to evaluate their existing office's structure, processes and relationships and to determine where refinement is needed. Our team works alongside yours to identify inefficiencies, clarify governance and introduce systems that improve transparency and responsiveness. Whether it's tailoring how investment decisions are communicated, integrating tax and estate planning more effectively or creating a framework for educating and involving heirs, we bring practical solutions that restore clarity and control. The result is a family office that's not just functioning but thriving.



SPECIALIZED SUPPORT

Our role goes beyond financial oversight. We help families protect wealth, support meaningful philanthropic goals and sustain continuity. Warren Averett provides specialized support, including:

- Coordinated tax compliance and planning across entities and jurisdictions
- Estate, succession and governance planning aligned with family objectives
- Daily money management and cash flow oversight
- Support for family foundations, nonprofits and charitable giving strategies
- Recruiting support for family office and household executives
- Cybersecurity, risk management and financial process optimization
- Valuation and transaction advisory services
- International tax coordination for cross-border assets and reporting



Gain clarity, confidence and continuity with a family office team that understands the complexity of your financial world. Visit www.warrenaverett.com to connect with a Warren Averett advisor today.