

Crowe Wealth

Crowe Wealth Management, LLC

“We explore and inspire to build family wealth.” At Crowe Wealth Management, our mission may sound simple, but it clearly describes our philosophy and guides us through the planning process. We can help you navigate the way through your wealth-building journey. As a fee-only provider of family office services, our independent focus is on your best interests. We build relationships with your other advisors to make sure we are all united – progressing toward the achievement of your dreams.

Crowe Wealth Management Service Offerings:

Personal Financial Planning

- ◆ Projections for retirement planning and wealth accumulation
- ◆ Investment planning
- ◆ Recommendations for estate planning opportunities
- ◆ Discussion of charitable planning tools
- ◆ Periodic review and implementation
- ◆ Insurance review (life, disability, property, liability)
- ◆ Analysis of will, trust and incapacity documents
- ◆ Coordination of financial indebtedness
- ◆ Structuring for family partnerships
- ◆ Development of family gifting strategies
- ◆ Efficient coordination with other professional advisors (CPA, attorney, insurance professional, stockbroker, banker, etc.)

Family Strategic Planning

- ◆ Asset distribution assurance
- ◆ Maximum wealth transfer to future generations
- ◆ Charitable gifting fulfillment
- ◆ Trust and estate planning
- ◆ Investment continuity
- ◆ Advisor continuity
- ◆ Family meetings
- ◆ Proactive planning and monitoring

Family Owned Managed Business Planning Services

- ◆ Business and ownership transition planning
- ◆ Strategic business planning
- ◆ Creating family and governance structures
- ◆ Relationship renegotiations and conflict resolution
- ◆ Successor assessment and leadership preparation
- ◆ Individual executive coaching
- ◆ Organizational management design

Fiduciary Services

- ◆ Wills
- ◆ Foundations
- ◆ Trusts
- ◆ Planned giving

Personal Services

- ◆ Insurance assessment and consolidation
- ◆ Payment of household activities
- ◆ Pre-nuptial agreement administration
- ◆ Professional services screening and negotiation
- ◆ Various other personal assistance
- ◆ Record keeping and bill paying
- ◆ Health insurance claims processing
- ◆ Professional resources
- ◆ Financing arrangements