CohnReznick's Family Office practice provides comprehensive advisory, assurance, and tax services to both families and family offices. We take pride in our entrepreneurial spirit and our understanding of today's most pressing issues. Our service approach and culture are designed to align with family values. We build a collegial and collaborative relationship, prioritizing client interests above all else.

Families and Family Offices Are Unique
Our clients have reached a level of complexity and sophistication that demands an advisor with deep experience and expertise. Each family client may fall into one or more of these categories:

- Building wealth through investments or operating businesses.
- Planning for and managing a liquidity event.
- Interested in preserving and transferring wealth.
- Cross-border families who need international tax and asset location planning.
- Families seeking business management services.
- Families with complex financial, tax, and operating issues.
- Family Offices that invest as principals, act as independent sponsors, or co-invest with other families.
- Family Offices investing in real estate.

Enhance Wealth and Maximize Business Value
Our Family Office Practice emerged from our long history of service to family-owned businesses, financial sponsors, and their principals. We enable our clients to live the lifestyle they choose and follow their passions, while achieving their financial goals and objectives. We work to reduce the burdens, distractions, and time requirements of managing wealth, while introducing insights and ideas to accelerate growth and create long-term value.

- Boutique, hands-on service and value with “large firm” capabilities and expertise.
- Direct access to seasoned and experienced professionals.
- Comprehensive solutions delivered by a collaborative team of specialists.
- Tailored and proactive services to meet the needs of each client relationship.
- Global industry expertise to address operating businesses and investments.
CohnReznick is an independent member of Nexia International

About CohnReznick
CohnReznick LLP is one of the top accounting, tax, and advisory firms in the United States, combining the resources and technical expertise of a national firm with the hands-on, entrepreneurial approach that today’s dynamic business environment demands. Headquartered in New York, NY, and with offices nationwide, CohnReznick serves many diverse industries and offers specialized services for middle market and Fortune 1000 companies, private equity and financial services firms, government contractors, government agencies, and not-for-profit organizations. The Firm, with origins dating back to 1919, has more than 2,700 employees including nearly 300 partners and is a member of Nexia International, a global network of independent accountancy, tax, and business advisors.

Learn More
For more information on how your organization can benefit from our services, visit https://www.cohnreznick.com/industries/private-clients/private-clients.

Family Needs and Interests | CohnReznick Solutions
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Accurate financial information | • Assess and implement performance reporting systems. Prepare or review balance sheets, cash flow statements, and liquidity analysis. Advise on selection and implementation of computer systems and other performance metrics.
Oversight and coordination of advisors and processes | • Central coordinator for oversight of all trusted advisors.
Security and privacy | • Assess, advise and remediate cybersecurity issues.
  • Identify key digital assets and advise on digital privacy.
Time for family, philanthropy and life objectives | • Outsourced family office.
  • Bill pay, bookkeeping, and concierge services.
Freedom from worry and regulatory issues | • Collaborative team providing comprehensive suite of solutions with a single point of contact.
Due diligence within the context of an investment as a limited partner, a co-investor, or a lead investor | • Buy side and sell side due diligence services to identify risks and opportunities of investments. Quality of earnings, M&A tax advisory, M&A integration and 100-day plans.
Trusts that are properly managed and contribute to family well-being | • Trusts and estates planning and administration.
  • Complete coordination with your trusts & estates counsel.
Connections to other families | • Access to our network of like-minded families and family offices interested in exploring opportunities and sharing best practices.
Timely advice on new and emerging issues | • Proactive intelligence and informed guidance on topics like tax, direct investments, and opportunity zones.
Purchases and sales of assets and operating businesses | • Advise on transaction due diligence, acquisition integration, valuations and risk management.
Management, governance and operation of family office | • Advise on tax efficient structuring of family offices, charitable gift planning, foundation set-up, and management and tax planning.

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