Tomorrow's opportunities start today.

DOMANI WEALTH

Solutions & Resources: Family Office Services

At Domani Wealth, we strive to see tomorrow the way you do. That's why we start each conversation by asking, "What does your tomorrow look like?"

To answer that, we've compiled some thoughtful questions to help you plan for the future and to gain insight on the services and experience we offer as an independent wealth advisory firm. Because at Domani Wealth, our focus is to lead you to a tomorrow filled with possibilities.

Are you ready to secure your family's legacy?

When it comes to your family legacy, you want peace of mind knowing that all the right details are in place to protect the future wealth of your loved ones. Through our family office services, Domani Wealth strives to ensure that your financial wishes are carried out safely, securely, and efficiently — for generations to come.

Many affluent individuals and their families desire a coordinated approach to managing their generational wealth, trust, gift, income tax, and legacy planning wishes. Establishing a family office can be the ideal opportunity for managing those needs. Our comprehensive services help to allow families to focus on their personal lives while Domani Wealth takes on the role of their personal CFO. The result is highly personalized wealth planning from a diverse team that understands the intricacies of your family office.

We offer all the services you need to successfully set up your family office, including:

Sophisticated Wealth Planning

- Estate and liquidity planning
- Trust and liability protection planning
- Formation of philanthropy plans, such as
  - Private foundations
  - Donor-advised funds
  - Charitable remainder and lead trusts
  - Endowments
- Transfers of highly appreciated assets
- Generation-skipping plans
- Income tax planning and portfolio tax efficiencies
- Risk and insurance planning

Investment Portfolio Management and Oversight

- Assistance in identifying appropriate risk allocations for various generations of family members
- Search for unique and uncorrelated investments
- Tax-efficient investing
- Review of illiquid investments
- Oversight and ongoing monitoring of investment performance, managers, and strategies
- Coordination with tax and CPA firms to manage overall portfolio tax planning efficiencies and cash needs

Other Related Family Office Services

- Personal accounting and bill pay
- Coordination of banking and lending needs of the family
- Assistance with other family matters beyond the numbers, such as
  - Eldercare decisions
  - Power-of-Attorney decisions
  - Healthcare Power-of-Attorney options
  - Personal family matters
  - Special-needs family members

Please See Reverse Side for Important Disclosure

IMPORTANT DISCLOSURE INFORMATION

Past performance may not be indicative of future results and different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by Domani Wealth, LLC), advice, or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, provide security or prove successful. Domani Wealth is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice.

A copy of our current written disclosure Brochure discussing our advisory services and fees is available upon request. The scope of the services provided depends upon the needs of the client and the terms of the engagement.