



## WE HELP YOU TAKE CARE OF WHAT'S IMPORTANT

If you're like many of the families we work with, building wealth and protecting your assets through generations is as important to you as it is to us.

Helping you preserve and grow your wealth is at the core of RSJ's family wealth practice. Our professionals combine extensive expertise and the advantages of our specialized approach to accounting, business and life, in order to handle the complex requirements of our high net-worth family clients. Our experts help you to develop clarity about long-term goals and structure strategies in alignment with those goals. We work closely with you, your family office staff and business advisors to customize services that meet your diverse personal, business and family goals, while always maintaining the highest degree of sensitivity and confidentiality. RSJ offers a unique ability to support your vision for success in the future.

As trusted advisors to numerous families of wealth, RSJ's extensive and knowledgeable team is adept at analyzing and implementing a wide array

of tax-efficient opportunities. With your values on how you structure your financial lives as our primary focus, we will work seamlessly with your other advisors to deliver the results you deserve.

The choices you make about the advisors you entrust with your finances are critical. They will determine the kind of life you have now and the legacy you leave for future generations. It's why we are glad you don't choose your financial advisors casually. You got where you are in your life by hard work, discipline and resourcefulness. So did we.

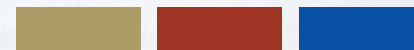
*When you work with RSJ, you gain a trusted member of your financial team. One you can count on to deliver a legacy of quality service designed to ensure your future is everything you want it to be.*

# Families of Wealth

RSJ, THE RESOURCES YOU EXPECT. THE COMMITMENT TO SERVICE YOU DESERVE.

YOU MAKE A LIVING BY WHAT YOU DO, BUT YOU MAKE A LIFE BY HOW YOU LIVE...AND YOU CREATE YOUR LEGACY BY WHAT YOU LEAVE BEHIND.

Rose, Snyder & Jacobs LLP  
ACCOUNTANTS & ADVISORS



# Families of Wealth

## How You Benefit by Working with RSJ

The loyalty of our clients is a testimony to our ability to turn our comprehensive knowledge of tax and business experience into solutions and opportunities that preserve and grow your wealth.

Our clients choose us because RSJ is dedicated to protecting the value of your family's generational assets and business, both now and for the future.

With RSJ, you get family wealth specialists who are highly skilled at addressing diverse client challenges. We will give you on-point intelligent guidance, a personalized financial roadmap to minimize your risks and effective solutions based on practical insights and experience. And you get the highest standard of quality, integrity and professionalism focused on giving you peace of mind.

Working with RSJ also means getting people-focused experts who not only understand that each client's goals, financial situation and family dynamics are different, but advisors whose business philosophy revolves around your needs, goals and personal priorities.

You know where you want to go, we know how to help you get there.

**Your Life, Your Legacy, Your Decision.  
Call us and find out more.**

### Services

#### Tax

- *Federal, State and Local Tax Compliance and Planning*
- *Estate and Trust Tax Compliance and Planning*
- *Gift Planning*
- *Tax Authority Representation*
- *Investment Performance Monitoring*

#### Accounting

- *Business Management*
- *Bookkeeping*
- *General Ledger Maintenance*
- *Back Office Management*

#### Family and Family Office Advisory

- *Family Estate Planning*
- *Family Succession and Legacy Planning*
- *Intergenerational Wealth Transfers*
- *Philanthropic Planning and Family Foundations*
- *Family Office Planning and Implementation*
- *Family Governance*

#### Family Business

- *Tax Compliance and Planning*
- *Assurance and Attest*
- *M&A Due Diligence and Transactional*
- *M&A Modeling and Analysis*
- *Transactional Structuring*
- *Feasibility Studies*
- *Strategic Planning*
- *Organizational Analysis and Strategies*



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