BLOSSOM FAMILY OFFICE

FAMILY VALUES

Legacy

Mission Statement

Constitution

Family Dynamics Planning

Summits, Mentoring and Education

Wellness

Impact Investments

INCOME DETAILS

Forecast Inflows and Outflows

Strategies for Guaranteed Income

Tax Optimization

Liquidity Needs:

- *Buy, Build, Renovate or Refinance Home*
- *Large Ticket Purchases*
- *Education*
- *Tax Obligations*

INVESTMENT PORTFOLIO

Asset Management

Accredited Investor

Design & Maintain Portfolio

Draft Portfolio Guidelines

Risk Assessment

Strategic Asset Allocation

Tactical Asset Allocation

Endowment Style Investing

Evaluate, Recommend and Manage Specific Investments:

- *Cash Management*
- *Corporate and Municipal Bonds*
- *Public Equity*
- *Private Equity*
- *Real Estate*
- *Absolute Return*
- *Natural Resources*

BUSINESS OWNER

Growth Capital and Financing

Strategic Advisory

Buy side/Sell side

Retirement Plans:

- *Defined Contribution Plans*
- *Defined Benefit Plans*
- *Executive Compensation*
- *Deferred Compensation*
- *IRAs*
- *Self-directed Retirement Plans*
- *Solo 401K and Individual 401K Plans*

Succession:

- *Leadership Development*
- *Family Limited Partnership*
- *Installment Sale to Family*
- *Buy-Sell Agreement*

ASSET PROTECTION

Wealth Protection

Hedging, Monetization or Dispositions of Concentrated Positions

Strategies for extracting liquidity from business

Interest rate and currency hedging

Evaluate and recommend the following:

- *Property/Casualty*
- *Excess Liability*
- *Disability / Health*
- *Key Person Insurance*

Premature Death

WEALTH TRANSFER

Facilitate the design of an Estate Plan

Coordinate Wealth Migration

Manage Charitable Giving

Multi-generational Planning:

- *Grantor Retained Trust*
- *Annual Gifts*
- *Charitable Remainder Trust*
- *Family Charitable Foundation*
- *Charitable Lead Trust*
- *Irrevocable Insurance Trust*
- *Personal Residence Trust*

SPECIAL PROJECTS

Concierge Services

Luxury Travel and Entertainment

Total Wealth Reporting

Trustee Advisory

Agricultural, Art, Aircraft, Nautical and Automotive Advisory

Multi-family Office

Single-family Office

Tax and Compliance Advisory

Cross-border Planning

Special Purpose Vehicle

Philanthropy:

- *Donor Advised Funds*
- *Charitable Vehicles*
- *Charitable Commitments*

Micro-financing

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