





BLOSSOM FAMILY OFFICE

 FAMILY VALUES	 INCOME DETAILS	 INVESTMENT PORTFOLIO	 BUSINESS OWNER	 ASSET PROTECTION	 WEALTH TRANSFER	 SPECIAL PROJECTS
<p>Legacy</p> <p>Mission Statement</p> <p>Constitution</p> <p>Family Dynamics Planning</p> <p>Summits, Mentoring and Education</p> <p>Wellness</p> <p>Impact Investments</p>	<p>Forecast Inflows and Outflows</p> <p>Strategies for Guaranteed Income</p> <p>Tax Optimization</p> <p>Liquidity Needs:</p> <p><i>Buy, Build, Renovate or Refinance Home</i></p> <p><i>Large Ticket Purchases</i></p> <p><i>Education</i></p> <p><i>Tax Obligations</i></p>	<p>Asset Management</p> <p>Accredited Investor</p> <p>Design & Maintain Portfolio</p> <p>Draft Portfolio Guidelines</p> <p>Risk Assessment</p> <p>Strategic Asset Allocation</p> <p>Tactical Asset Allocation</p> <p>Endowment Style Investing</p> <p>Evaluate, Recommend and Manage Specific Investments:</p> <p><i>Cash Management</i></p> <p><i>Corporate and Municipal Bonds</i></p> <p><i>Public Equity</i></p> <p><i>Private Equity</i></p> <p><i>Real Estate</i></p> <p><i>Alternative Investments</i></p> <p><i>Absolute Return</i></p> <p><i>Natural Resources</i></p>	<p>Growth Capital and Financing</p> <p>Strategic Advisory</p> <p>Buy side / Sell side</p> <p>Retirement Plans:</p> <p><i>Defined Contribution Plans</i></p> <p><i>Defined Benefit Plans</i></p> <p><i>Executive Compensation</i></p> <p><i>Deferred Compensation</i></p> <p><i>IRAs</i></p> <p><i>Self-directed Retirement Plans</i></p> <p><i>Solo 401K and Individual 401K Plans</i></p> <p>Succession:</p> <p><i>Leadership Development</i></p> <p><i>Family Limited Partnership</i></p> <p><i>Installment Sale to Family</i></p> <p><i>Buy-Sell Agreement</i></p>	<p>Wealth Protection</p> <p>Hedging, Monetization or Dispositions of Concentrated Positions</p> <p>Strategies for extracting liquidity from business</p> <p>Interest rate and currency hedging</p> <p>Evaluate and recommend the following:</p> <p><i>Property/Casualty</i></p> <p><i>Excess Liability</i></p> <p><i>Disability / Health</i></p> <p><i>Key Person Insurance</i></p> <p>Premature Death</p>	<p>Facilitate the design of an Estate Plan</p> <p>Co-ordinate Wealth Migration</p> <p>Manage Charitable Giving</p> <p>Multi-generational Planning:</p> <p><i>Grantor Retained Trust</i></p> <p><i>Annual Gifts</i></p> <p><i>Charitable Remainder Trust</i></p> <p><i>Family Charitable Foundation</i></p> <p><i>Charitable Lead Trust</i></p> <p><i>Irrevocable Insurance Trust</i></p> <p><i>Personal Residence Trust</i></p>	<p>Concierge Services</p> <p>Luxury Travel and Entertainment</p> <p>Total Wealth Reporting</p> <p>Trustee Advisory</p> <p>Agricultural, Art, Aircraft, Nautical and Automotive Advisory</p> <p>Multi-family Office</p> <p>Single-family Office</p> <p>Tax and Compliance Advisory</p> <p>Cross-border Planning</p> <p>Special Purpose Vehicle</p> <p>Philanthropy:</p> <p><i>Donor Advised Funds</i></p> <p><i>Charitable Vehicles</i></p> <p><i>Charitable Commitments</i></p> <p>Micro-financing</p>

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