

## COMPREHENSIVE FAMILY OFFICE SERVICES

# Guiding Your Unique Legacy

Baldwin Wealth Partners provides comprehensive wealth management solutions to minimize stress and maximize joy for you and your family.

**Our commitment is to simplify your present and illuminate a brighter future for generations to come.**

### Investment Management

- Analyze cash needs and cash flow
- Prepare net worth statements
- Bill pay and cash transfers

### Estate & Wealth Transfer Planning

- Establish decision-making authority and governance procedures
- Foster communication among family and stakeholders
- Coordinate meetings with advisors
- Ensure necessary insurance coverage
- Family gifting strategies

### Education

- Next-generation financial planning and strategies
- Personalized fiscal education
- Lifestyle strategies and counsel
- Budgeting, monitoring and review

### Tax Coordination

- Coordinate tax planning
- Consolidate and present tax forms
- Coordinate and process estimated quarterly tax payments
- Tax minimization strategies
- Cost basis tracking and reporting

### Philanthropic Planning

- Charitable administration
- Foundation management
- Next-generation philanthropic education

### Customized Reporting

- Comprehensive investment performance and asset allocation reporting
- Performance benchmarking
- Admin and oversight of alternative and direct investments

### Personal Administration Management

- Residential property management
- Payroll setup and processing
- Property, casualty, and liability insurance review
- Travel management
- Trust administration and management





*Certain risks exist with any type of investment and should be considered carefully before making any investment decisions. Keep in mind that current and historical facts may not be indicative of future results.*

*Additional information, including management fees and expenses, is provided on our Form ADV Part 2 available upon request or at the SEC's Investment Adviser Public Disclosure website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).  
Past performance is not a guarantee of future results.*

[www.baldwin-llc.com](http://www.baldwin-llc.com)