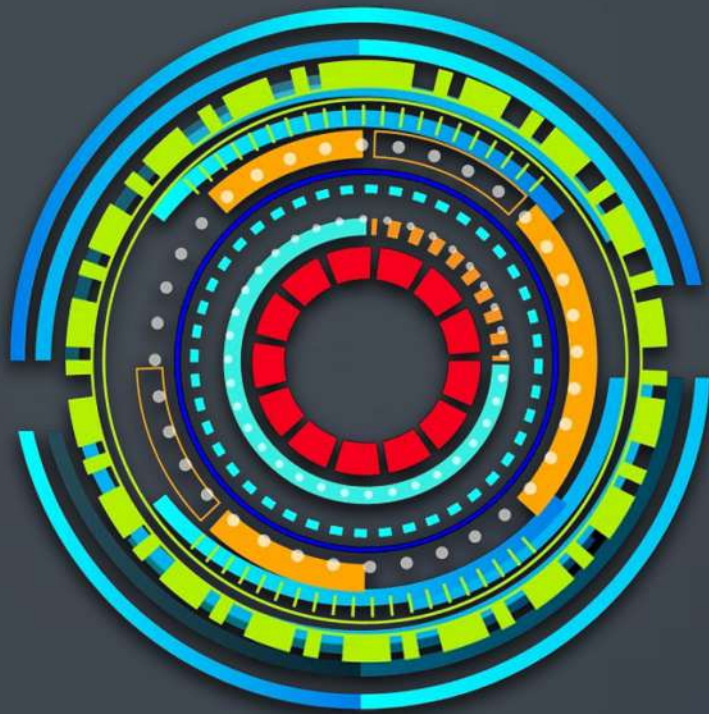




Private Wealth

Protect your Legacy



Sustain, enhance, and protect your wealth

AideOne's Private Wealth solution focuses on the specialized needs and circumstances of the wealthy, including generational families, entrepreneurs, and closely held business owners. In an era of complex tax laws, stringent regulations, and a turbulent investment environment, we are highly trusted advisers with knowledge, experience and broad resources to protect your wealth.

Customized for your needs and circumstances

Today's environment presents wealthy families and their advisers with both potential opportunities and unprecedented complexities. How is globalization and digital economy changing your wealth creation opportunities? How confident are you in the steps taken to respond to evolving financial, technology, and regulatory compliance risk?

How can our Private Wealth team help you pursue financial, tax, family and personal objectives?

Broad-based capabilities

We help clients navigate a broad range of wealth strategies, issues and topics, such as those below. So, what's on your mind?



Family Investment Valuation

- Technology solutions for investment structure
- Entity structuring for multiple asset classes
- Direct private equity services and investment due diligence
- Investor reporting – Net worth valuation
- Tax planning and compliance.



Comprehensive Tax and Financial Advisory

- Integrated personal income tax planning
- Income tax compliance
- Comprehensive financial advisory



Family Offices

- Organizational structure and resourcing
- Assessing financial systems needs and implementing appropriate technology
- Establishing and implementing policies, procedures and internal control
- Developing of budgets and forecasts
- Developing financial and management reporting packages
- Design and implementing banking structure
- Facilitating information flow with service providers and investments
- Establishing filling systems
- Structing of income tax efficiencies.



Forensic Services

- Forensic Accounting



AideOne delivers audit and assurance, tax, consulting, and risk and financial advisory services tailored for private companies, including family-owned businesses, closely-held (non-family) businesses, and private equity and venture-capital-backed businesses.

We recognize the importance of the private company market and its impact on economies worldwide. We created this solution to clearly demonstrate our commitment to this market segment, establish stronger connectivity with our client, and better serve private clients wherever they need us."

Tailored approach

Our team works to customize our service capabilities to each client's specific needs, size, and ownership structure. A lead partner coordinates a single team, comprising audit & assurance, tax, consulting, risk and financial advisory professionals.

Technical abilities

The broad range of technical abilities among our professionals allows us to address complexity and find the right answer, often by simply "walking down the hall"—as opposed to starting from scratch.



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