



# Welcome to Family Office Concierge

## The Concept

**Concierge** from Gregg Latchams' Family Office is an exclusive service that has been designed to provide you with executive management of confidential personal, family business and business affairs.

Our service acts as the 'trusted advisor' for personal, family business and business affairs. We are dedicated to providing the key links to specialists that help you manage, grow and preserve your assets for the future.

We understand the close and sensitive relationship that exists between your personal and business lives – and **Concierge** helps manage this through a bespoke package of services that alleviates the need for multiple advisers and relationships. Our expert team will work with you to understand your precise personal requirements and those of your family and business, so we can seamlessly integrate them.

We provide you with a tailored, comprehensive plan to suit your individual needs giving you complete peace of mind. This enables you to concentrate on your business and personal interests whilst our team of experts take care of key day-to-day requirements.

**Concierge** will provide on-going support; attend family or business meetings and present advice on demand. All in one cohesive package, you really can take advantage of our legal services and draw on our expertise in finance, wealth management, tax, trusts and investment.

## Services that can be included in Family Office Concierge

- **Business** – legal support, administrative back-up and executive assistant services.
- **Home** - our team work closely with property and can source property for purchase, make survey arrangements, organise furniture valuations and project manage contractors to bring your home vision to life.
- **Insurance** - managing all of your insurances, including continuity of policies.

- **Property** – from complete project management through to acting as the registered key holder on your insurances and we'll also check on your property whilst you're away on business or holiday.
- **Tax** - ensuring your tax requirements are met for your personal tax returns; both national and international.
- **Employment** - overseeing tradesmen and contractors, as well as any domestic staff, whilst managing employment status and contracts.
- **Tenancy** - managing the details of tenancy agreements and assisting with tenant selection.
- **Documentation** - preparing confidentiality agreements and signatures.
- **Investment** – working alongside our sister company, GL Integrity Financial Planning, for all forms of investment advice from reviews of needs through to bespoke benchmarking of existing portfolios.

Family Office **Concierge** has been developed using our client's insights. We listen to your requirements to create a service that is bespoke and distinctive.

Our services are on a retainer-based agreement. This offers scope for as little or as much assistance as required and allows effective cash flow management by being payable on monthly or quarterly instalments. We discuss this at your free initial consultation, along with the choice of services you would require and amount of time to be allocated each month to fulfil them.

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