Northeast
Investment Management, Inc.

www.northeastinvest.com

Family Office Services

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Overview

As wealth accumulates, managing the finances of a family becomes more involved and time-consuming.

Northeast reduces this burden, often complicated by trusts and more complex relationships, by managing financial transactions and tasks for clients that request our assistance. This “family CFO” support may range from routine bill-paying to more complex or specialized activities. The level of service is customized to the needs and priorities of each relationship.

Our family office services may include:

- Family budgeting
- Bill payment
- Management of charitable giving
- Insurance planning
- Personal trustee services
- Intra-family lending arrangements
- Financial education of family members

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