# Family Office Services

1. ***Strategic Financial Review***
    a. Quarterly/semi-annual financial review to consider planning priorities and opportunities for current and future events while anticipating:
        i. Changes in family and business circumstances;
        ii. External trends; and
        iii. Changes in personal perspectives, risk tolerances and expectations.

2. ***Financial Planning and Compliance***
    a. Deadline management and compliance coordination and review
    b. Transactional planning and coordination of professional advisors
    c. Cash Flow monitoring and coordination between advisors
    d. Tax Efficiency monitoring and follow up
    e. Monitoring of Estate Plan and alignment
    f. Philanthropic planning and coordination

3. ***Investment Council Accountabilities***
    a. Return on Investment consolidated reporting and quarterly review
    b. Investment Council Fee reporting

4. ***Family Financial Communications***
    a. Facilitation of family meetings to discuss financial matters
    b. Monitor, update and communicate family financial goals, values and strategies
    c. Educational sessions regarding financial related matters (structuring of family holdings, trusts, investments, shareholder's agreements…..)

5. ***Financial Services for Incapacitated Dependants (Parents)***
    a. Tax Compliance
    b. Estate Planning
    c. Executor Assistance
    d. Post Mortem Tax Planning

6. ***Maintenance of Financial Records***

**Shelagh Rinald**

- Chartered Accountant (1989)
- Trust and Estate Practitioner (2002)
- Certified Financial Planner (1998)
- Tax Specialist (1991)
- Trained Family Council Facilitator (1998)
- Canadian Securities Course (1984)