IMPACT CONNECTIONS

Your virtual family office

Making life easier

Life gets complicated. Making financial and household decisions shouldn't be. Join other families who are simplifying life through the Impact Connections Virtual Family Office. You can lean on us when making critical, time sensitive decisions. Together we will take care of your family so you have time for the good things in life.

A family office for everyone

Family Offices are often only for the wealthy. Yet don't we all deserve the benefit of great advice when making decisions? The Impact Connections Virtual Family Office was created for every family regardless of wealth, status, or size. As a multi-family office, we bring together local experts dedicated to meeting all of your financial and household needs so you can make great decisions.

Reach out to your advisor to learn more or email us at information@impactVFO.com

FAMILY FIRST

A true extension of your family

Harnessing the experience, dedication, and loyalty of independent advisors to guide and coordinate your financial and household decisions.

Wealth Preservation

Retirement planning Qualified plans Succession planning Guided philanthropy

Accounting

Services

Bookkeeping

Tax strategies



Personal CFO

Financial planning Cash flow management Investment strategies Wealth strategies Global asset management Trustee services



Risk and Asset Protection

Property and casualty insurance Health insurance Life insurance Supplemental/voluntary benefits

VIRTUAL FAMILY OFFICE



Legal Services

Real estate Buy/sell agreements Business contracts Estate planning Elder care



Real Estate

Buy/sell/lease Commercial brokerage services Property management Residential Residential lending

Lifestyle and Household Management

Tax preparation and planning

Bill payment services
Child and elder care
College planning and funding
Major purchase assessments



Business COO

Cash management
Credit card processing
Commercial lending
Commercial business broker
Employee benefits



Partners you can trust

All Family Office partners have been hand selected and share a common approach to managing client relationships. You can expect consistent, informed and exceptional guidance from every partner and be assured you and your family are at the heart of every decision made.

