



CMG
Service



CMG
Global Partner
Service



CMG Family Office

CMG's virtual Family Office dovetails seamlessly within the GP's existing infrastructure. We integrate your current in-house infrastructure with all of the necessary services to create a world class virtual family office for each GP. CMG acts as your personal Chief of Staff with a depth of intellectual talent and resources for family wealth stewardship, tax planning, risk management, and investment services. The CMG team has decades of experience as being the trusted advisers to many of the country's wealthiest families. On a case by case basis CMG will coordinate with our trusted global partners to deliver the best solutions to our clients. CMG realizes that it needs the expertise of our partners to create the "best in class" open architecture platform. CMG will deliver the highest standards of confidentiality through our secure client web portal and proprietary technology.

Tax Planning & Compliance

- Entity structuring
- Estate planning
- Wealth transfer planning
- Charitable planning
- Income tax planning
- Cross border consulting
- Compensation planning
- Expatriate Tax Compliance
- 1040NR

Accounting Services for General Partners

- Client access via secure web portal for immediate answers to questions about their net worth
- Customizable dashboard view available for every user
- Investor level income and ownership reporting
- Financial Statement Preparation
- Full preparation of partnership, trust, company financial statements

Insurance Services & Risk Management

- Oversee Life Insurance policies
- Oversee P&C policies

Estate Planning & Compliance

- Review and monitor Estate Planning
- Tax Planning
- Prepare financial statements
- FTS Estate Checklist:
 - FTS Estate Online Document Vault
 - Gift Planning
 - Oversee wills, Healthcare proxies, Power of Attorney and Trustees

Philanthropic Planning

- Arranging introductions to national and international leaders in your field of interest
- Connecting you to like-minded philanthropists
- Securing leading consultants for targeted programs and projects
- Handle all compliance and administration
- Optimizing available income tax benefits
- Integrating income tax benefits with estate, gift and generation-skipping transfer tax planning
- Designing charitable gifts to fit the client's overall objectives and financial situation, including outright versus deferred gift considerations
- Selecting the right vehicle, such as a trust, public or private foundation, or charitable gift fund

Specialized Services

- Organizing like minded Family Office Meetings
- Negotiate and oversee Yachts and Aircraft contracts including charter service, fractional ownership and full ownership
- We assist in evaluating the ever-increasing and complex club and resort travel programs
- Assist in Real Estate transactions
- Family Education

Investment Monitoring and Reporting

- Asset allocation analysis
- Compliance monitoring and reporting
- Performance reporting
 - Benchmark analysis
 - Peer analysis
 - Risk and return analysis
- Secure web access to all reports and financial information

Investment Advisory Services

- Select and negotiate fees for potential Investment Advisers
- Private investments: manage commitments, capital calls, distributions, track redemption notices
- Track performance for all investments
- Track cost and tax basis for all investments
- Act as gatekeeper for new investment proposals
- Oversee asset allocation
- Prepare subscription agreements