WHY DO I NEED A PRIVATE FAMILY CONCIERGE?

As part of the Oxford Financial Group, Ltd.,™ Family Office Services team, the Private Family Concierge works closely with your Client Relationship Director to provide seamless financial and administrative support for you and your family.

This professional, confidential support system will allow you to focus on what matters most to you, whether it's your business, additional family time, philanthropic pursuits or extensive travel.

NO TWO CLIENTS ARE QUITE THE SAME

Services offered by the Oxford Private Family Concierge program are as diverse as our clients. A suite of services is developed for each client to manage specific needs and preferences. Services may be extended to clients' children or parents. A sampling of these services follows.

- Cash flow modeling and expense budgeting
- Detailed financial and other reporting
- Managing household finances and bill-paying
- Coordinating philanthropic activities
- Recordkeeping for personal and family charitable giving
- Personal assistance for client and/or family
- Assisting with filing and tracking insurance claims
- Organizing home office and files
- Developing and maintaining a database of household inventory
- Coordinating with staff of parents' assisted living center nursing home, insurance carriers and health care professionals
- Checking and collecting home mail when client is out of town
- Arranging for home services and repairs
- Accumulating information for tax returns/estimates
- Coordinating with Oxford and other advisors as requested
- Coordinating travel arrangements for client
- Traveling to various client homes (in town or out-of-state) at client's request

CALL ON US

To learn more, please give us a call or drop us a note. We'll be happy to visit with you at your home or office and tell you more about our services. We cordially invite you to visit our office, to help us learn more about you and your needs.

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