Deloitte.
Private

Deloitte family office services

Differentiated capabilities to serve family operations

SECOND EDITION

COMPLIANCE AND REPORTING

CONTENDING WITH COMPLEX REPORTING OBLIGATIONS

Tax compliance, accounting, and regulatory reporting for your family office can feel like navigating an inescapable maze. Deloitte can assist with this complexity, helping you navigate the impact of accounting events using technology to streamline tax compliance, and addressing the specific attest and regulatory needs of your family office—so you can focus less on administration and more on what's important to the family.

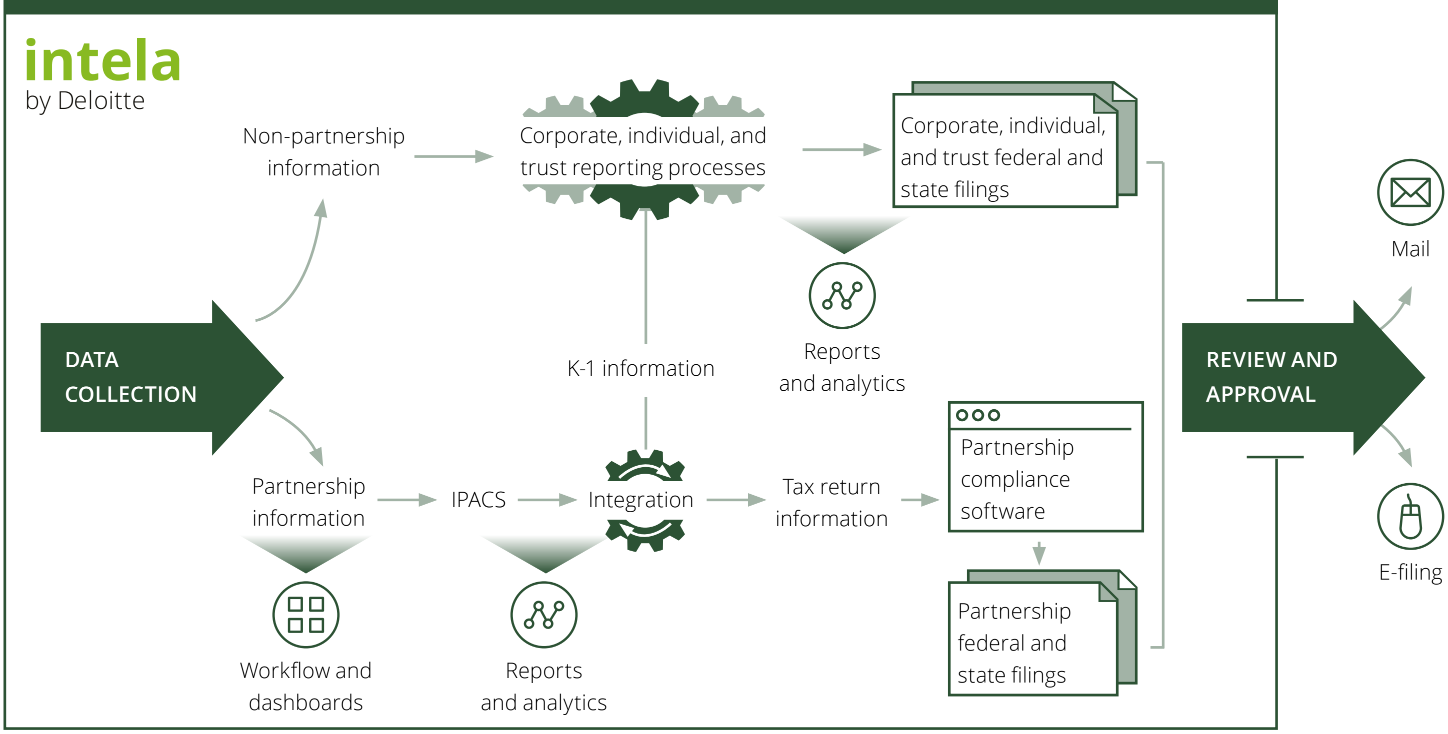
Tax compliance and technology

MARKET-LEADING TAX COMPLIANCE DELIVERED WITH TECHNOLOGY FOR FAMILY OFFICES

Family offices are responsible for navigating an ever-changing tax, regulatory and reporting landscape. The family office is often the hub for coordinating complex investment vehicles, reporting to investors from those vehicles, implementing wealth strategies, and supporting their clients: the family members. Family members and regulatory agencies can impose significant demands on family office resources, so the need for automated technology to deliver quality and efficiency across the end-to-end tax life cycle is important.

Deloitte's tax services delivered with our leading technology solutions are tailored for family offices' unique needs while maintaining quality, consistency and accuracy throughout. Our technology supports the entire tax compliance and reporting process, from the receipt of investment and financial information through the reporting of tax information to the family members and tax authorities. This allows the family office to spend less time on process details and more time serving the important needs of the family.

AN END-TO-END TECHNOLOGY ECOSYSTEM FOR A FAMILY OFFICE



OUR SERVICES

01 Tax compliance

- Combine family office industry and tax technical experience with the assistance of our Washington National Tax Services.
- Prepare federal and state individual, trust, partnership, corporate, exempt organization, estate, gift, and excise tax returns, as well as informational and foreign disclosure forms.
- Employ technology including, but not limited to, optical character recognition (OCR), natural language processing, and Generative AI to increase speed and accuracy.
- Adapt to the talent and resource needs of the family office tax function.

02 Tax consulting

- Provide a wide variety of tax consulting services, including income tax planning, charitable planning, wealth transfer planning, and post-mortem services.

03 Investment partnership reporting

- Assist family offices with economic reporting for investment partnerships, including capital account maintenance and allocations of income, expense, gain and loss on a partner-by-partner basis to meet various economic reporting needs.

OUR TECHNOLOGY

Our services provided using Deloitte's proprietary technologies can help streamline the entire reporting process—from leveraging Optical Character Recognition (OCR) to assisting in data collection to providing insightful analytics—enhancing communication, improving output quality, and enabling proactive, informed decisions.

intela
by Deloitte

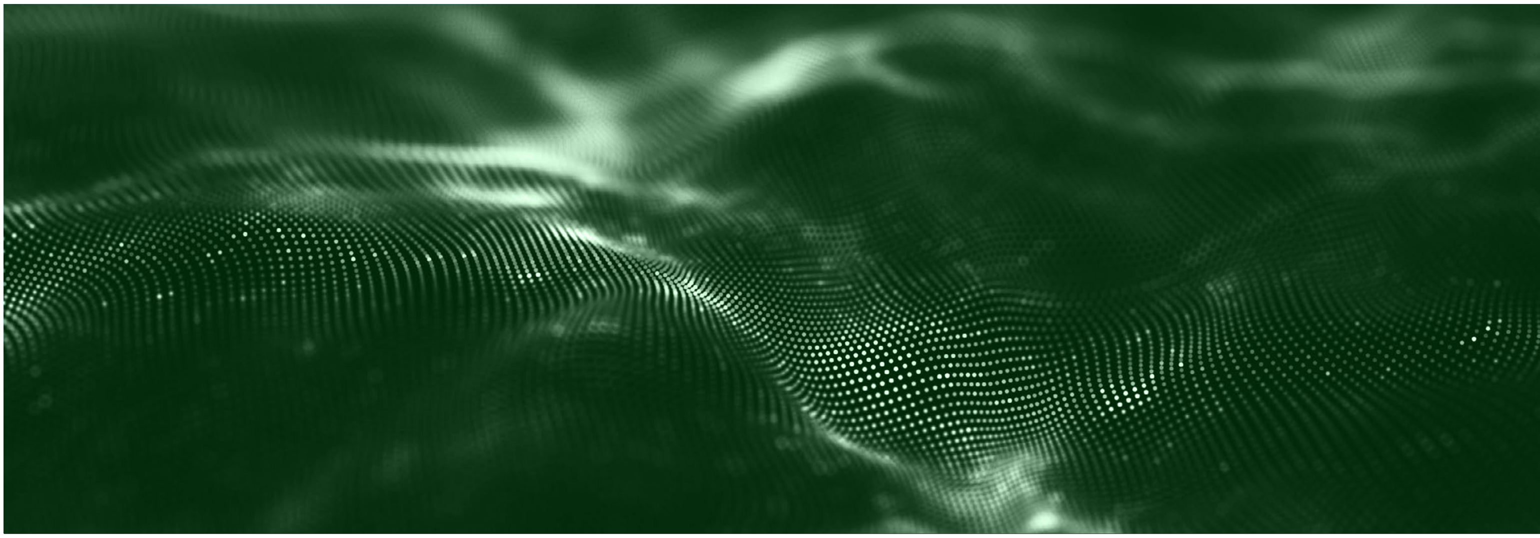
Intela is a global platform designed to power your tax experience with Deloitte. By combining AI and cloud computing technologies, Intela can help unite information, processes, and teams, and automate workflows while also providing customized-for-you views of Deloitte knowledge on tax developments and industry trends.

- *A smarter way to collect, analyze, transform, organize, and extract your data.* No need to spend countless hours retrieving data from multiple sources. Intela provides a range of data collection options, from interactive information requests, AI-powered document drop, and Secure File Transfer Protocol (SFTP) to automate and enable repeatable data extractions using leading-edge technologies. Intela helps to reduce time spent gathering data to quickly begin work.
- *Intela helps your team and ours collaborate in real time, addressing questions quickly and sharing information.* Intela's work plan allows you to track work together so teams can be proactive, keeping minor issues from becoming major fire drills. Everyone is working with the latest information, contextually, and can identify insights earlier in the process and accelerate progress. This includes you, your Deloitte engagement team, and your third-party advisors.
- *Smart and efficient tax compliance and planning can drive real strategic value for your organization.* Intela gives you visibility over your Deloitte tax engagements, making commitments clear and keeping track of assignments, dates, and progress in real time. So your team can spend less time reviewing details and more time focused on the activities most important to your organization.
- *Intela provides a customized Deloitte knowledge experience that includes updates and industry-specific content from our easy-to-reach network of global specialists.* By delivering data-based insights and tailored thought leadership to help you uncover new opportunities, Intela can help you can unleash the power of technology to identify opportunities and provide strategic value.
- *You hire one firm for several services, expecting a single, holistic view of all your projects.* Intela delivers with one consolidated view, globally. Where appropriate, information can be shared across teams to deliver a consistent experience. Intela also streamlines appropriate collaboration between teams and makes data analysis, knowledge-sharing, and communication more efficient.

iPACS

The industry's most mature technology for delivery of partnership tax reporting services, iPACS allows us to more easily manage increasing volume and growing regulatory reporting demands and gain efficiencies through consistent preparation and delivery. iPACS has the functionality and flexibility to reduce processing time and mitigate operational risk while creating reporting that will aid your review of our deliverables and give you the ability to add value to the organization. iPACS functionality is built to support your business needs, including:

- Extracting, transforming, and loading data in a flexible, secure, and scalable manner.
- Automating the allocation and tiering of federal and state taxable income, expense and footnote items to and within the fund.
- Providing full functionality on a periodic or interim basis for estimates, realizations, and scenario planning.
- Capturing deal-by-deal information and storing a vast number of details at the instrument and associated fund levels.
- Providing both standard and ad hoc reports in real time with access to all information provided to investors in their tax package, with scalable detail from activity by investment to cross-entity summaries.
- Coupling financial and demographic data from federal tax filings with data extracted from Forms W-8 to analyze obligations under the information reporting regimes.
- Instantly activating and preparing federal and state returns and select international filings with a digitized and automated review process.



Accounting events and transaction services

ADVISING YOU IN UNCHARTED TERRITORY

Family offices often thrive amid evolution, but crucial moments like restructuring for tax efficiency, tackling unique transactions, diversifying into emerging investment strategies, experiencing rapid growth, or adopting new accounting frameworks can present significant challenges.

Further, an important facet of family office operations is maintaining trust in the financial reporting processes and related information. Formalized accounting policies and procedures are critical in support of this priority, as family offices strive to demonstrate consistency and accuracy. The use of standardized policies provide for a clear framework for decision-making, enhance transparency, mitigate risks associated with financial mismanagement, and facilitate better planning, enabling family offices to effectively manage wealth across generations.

Deloitte's accounting, controls, and reporting advisory professionals can help you meet these challenges and address these goals head-on by providing a customized approach to assessing your accounting needs, whether it be reviewing the accounting for a complex transaction, providing advice on accounting policies and procedures in connection with a restructuring, or evaluating your accounting records and policies to create consistent bookkeeping processes going forward. Leveraging our deep industry experience, we bring the flexibility and scalability to meet your evolving circumstances, whether arising from pivotal moments such as the adoption of an investment partnership structure, a major liquidity event, or the setting up of operations—or on a regular and long-term basis to guide consistent and transparent accounting and reporting processes.

OUR SERVICES

ONE

Accounting research

Deloitte can advise on understanding, assessing the impact of, and operationalizing complex accounting and reporting changes resulting from shifting regulations, evolving operations or restructuring, bespoke investment vehicles or structures, or liquidity events. We can advise your team by sharing research on these complex topics while advising and providing documentation on the appropriate accounting treatment under the applicable accounting framework.

TWO

Advising on accounting and finance policies

Deloitte can advise on accounting and finance policies. We begin by understanding the current accounting framework, sources of information, objectives, and pain points. We then perform relevant research and bring industry leading practices to advise family offices on consistent policies and processes related to treasury, cash and expense management, and investment management (including valuation).

THREE

Advice on accounting conversions

Our team can advise you through conversions from one basis of accounting to another—such as from special purpose to GAAP, or from tax cash to tax accrual, and vice versa. Whether your goal is to simplify reporting, create more relevant financial statements, or obtain an auditor’s report from an independent audit firm, we can help you identify the appropriate accounting framework and assist in the preparation of financial statements that are tailored to what matters most for the family office.

Audit and other services

TRUST THROUGH TRANSPARENCY

In the complex world of family office management, accurate financial statements and precise asset valuations are paramount for effective decision-making. Each family office has unique opportunities, challenges, and plans for the future. A Deloitte audit focuses on the areas of highest risk and helps reduce the burden on your team. Our family office audit methodology incorporates workflow automation, artificial intelligence, and data analytic tools that enable us to help provide insights. We build teams with an understanding of family office matters, have a deep, up-to-date grasp of auditing standards, and can apply experience from working with family offices of various sizes. We take a focused approach to the entire ecosystem supporting the family—including the family office, investment partnerships, and foundations—offering high-quality digital audits, so you can spend more time on what matters.

Our services

Many family office offices today oversee hard-to-value assets which are often tied to complex senior executive compensation plans. Independent audits provide reasonable assurance that the financial information is free of material misstatement and may include a combination of the following procedures:

- Audit of financial statements prepared in accordance with US GAAP, IFRS, or on tax basis of accounting
- Test of the design and implementation of key internal controls over financial reporting, including governance, investments, and cash management
- Confirmation of physical assets
- Hard-to-value asset confirmations and valuation.

Our team can also provide advisory services designed to address areas of focus as identified by the family and its executives. We would collaborate on a plan for assessment with deliverables typically including transaction testing findings and specific recommendations for process enhancements. Example engagements include:

- Cash management process
- Investments process—due diligence through valuation.

OUR CLIENTS

01 Family offices and family-owned businesses

We provide audit and assurance services tailored to private companies, including family offices, family-owned businesses, and portfolio companies owned through family private equity partnerships.

02 Family investment partnerships

Whether to further professionalize investment management services provided to family investors, establish a basis for employee and executive compensation, or to establish an audited track record of performance to solicit third-party funds, an audit can provide reasonable assurance on the financial information provided by management.

03 Private foundations and other philanthropic vehicles

Some states' government agencies require an independent financial statement audit for charities (including private foundations) of a certain size, and it's generally thought to be a leading practice for all large private foundations to receive an audit report.

Investment management and regulatory compliance services

COMPLIANCE REIMAGINED FOR GROWTH

In an era where regulatory landscapes are constantly shifting, family offices are not just adapting—they're leading the charge toward transformation. Many of these entities structure their operations to qualify for the Securities Exchange Commission (SEC) "family office" exemption* from investment adviser registration, yet some decide to expand their horizons by managing third-party funds, necessitating a transition to becoming a Registered Investment Adviser (RIA). This strategic move is redefining the art of opportunity for family offices in the financial services world—and Deloitte can help. Becoming an RIA isn't merely about compliance with the laws and regulations that the SEC oversees; it represents a powerful catalyst for growth, unlocking new investment product opportunities and distribution channels that have the potential to drive profitability and growth for the newly registered entity.

At Deloitte, we recognize that transitioning to an RIA is a pivotal step toward not just meeting regulatory standards but elevating operational efficiency, portfolio management, and distribution capabilities. Our role is to guide you through the complexities of SEC registration, weaving compliance effectively into the very core of your business strategies. We will support your transition in a way that aligns with your long-term business goals and growth aspirations. Additionally, Deloitte offers managed services that can help streamline your operations, enhance risk management, and ensure continuous compliance, so you can concentrate on driving strategic growth and nurturing client relationships.

*The exemption from investment adviser registration under the Investment Advisers Act of 1940, as amended, pursuant to 17 C.F.R. § 275.202(a)(11)(G)-1.

OUR SERVICES

Regulatory guidance

Demystify the complexity of applicable laws and regulations that the SEC oversees, navigating your family office through the registration process and beyond to help you align your business operations to the latest compliance requisites and leading industry practices.

Operational transformation

Craft governance structures and compliance frameworks that resonate with your family office's unique ethos while navigating the regulatory demands of being an RIA.

Due diligence and oversight

Assess third-party service providers and establish oversight structures and mechanisms to help you further your fiduciary duties consistent with regulatory and investor expectations.

Technology integration

Harness emerging technologies to provide your family office with competitive advantages and operate consistent with regulatory compliance obligations.

Portfolio valuation services

BRINGING CLARITY AND CONFIDENCE TO YOUR PORTFOLIO

Unlock the true potential of your investments with Deloitte's Portfolio valuation services (PVS). Our innovative technologies and knowledgeable valuation professionals bring clarity and confidence to your portfolio, driving efficiency, helping reduce risk, and freeing up resources for your strategic priorities.

From the initial investment to the exit, our team is with you every step of the way. PVS empowers family offices with insightful valuation analysis, keeps you abreast of the latest valuation guidance, and provides tailored, in-depth periodic valuations of your holdings. Whether it's for charitable giving, estate tax planning, inheritance and succession planning, asset sales, capital allocation, portfolio management, risk assessment, legal compliance, equity compensation, collateral for loans, or resolving family and legal disputes, our valuations are critical to your operations and strategic planning.

As your trusted provider, we deliver objective feedback on family office or third-party valuations and offer a wide range of services. Trust Deloitte's PVS to deliver the clarity and confidence you need to make informed investment decisions.

The ValueD advantage

ValueD is a powerful new technology platform that leverages artificial intelligence (AI), market-based benchmarks, and our vast industry experience to improve the valuation process, cut through complexity, and provide deeper insights into how valuations are performed through a real-time dynamic view that our clients can use to improve their strategic decision-making.

With ValueD, we can help you develop quicker and deeper insights and provide you with access to dynamic tools for informed business decisions. Real-time scenario and sensitivity capabilities allow us to efficiently identify impactful assumptions and inputs.

Enhanced quality
Leverages AI and cognitive technologies coupled with our experience to enhance quality and reliability.

Business insights
Provides benchmarking and insights based on a variety of research and proprietary databases to provide insights that enable informed business decisions.

Dynamic modeling
Offers the ability to dynamically perform multivariable sensitivity analysis and evaluate alternative scenarios on demand.

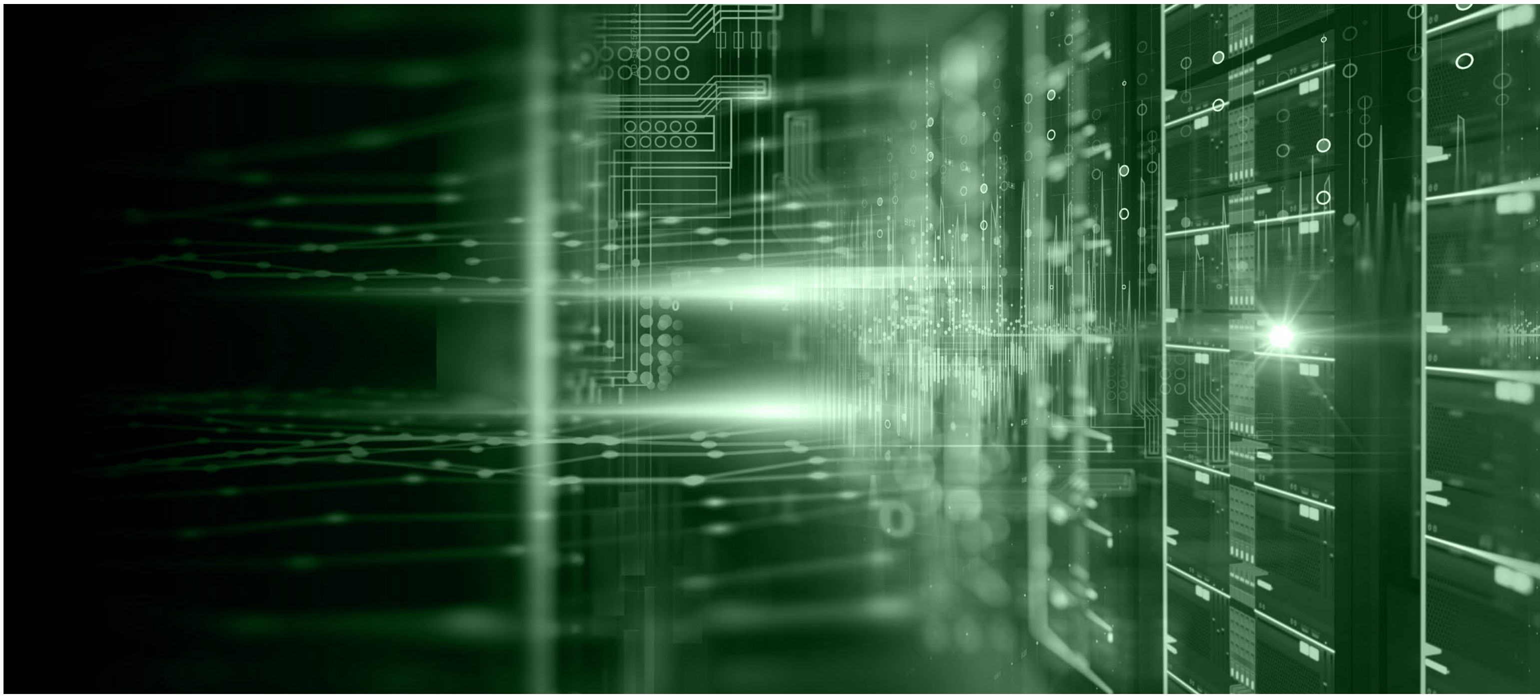
Data analysis
Click-through experience provides an improved understanding of sources and calculations enabling you to uncover and convey true value.

Valuation management
Provides enhanced visibility of project status, enables real-time tracking of data requests, and facilitates response to data requests.

OUR SERVICES

We tailor our services to meet your particular needs, leveraging leading industry practices to offer objective valuations, cosource services, concurrence opinions, or a combination. We can cover your entire portfolio or just a sample. Our team provides objectivity in external valuations for auditors, regulators, and fundholders, and we can assist you with model development, fair value reporting, and risk mitigation.

Objective valuation	Cosource arrangement	Concurrence opinion
• Provide independent valuation of each investment. • Deliver a wide range of estimated fair values. • Clients determine the fair value for their reporting. • Help clients reduce their risk while supporting portfolio growth. • Provide documentation for auditors and regulators. **Deliverables:** • Deloitte-branded signed cover letter. • Concluded range of fair value estimates. • Narrative describing methodologies and assumptions. • Valuation exhibits.	• Deloitte specialists work with your internal valuation team to develop valuation models and document inputs and assumptions. • Provide a single value or range of values based on the client's circumstances. • Clients determine the fair value for their reporting. • Enhance internal valuation processes and support portfolio growth. • Strengthen valuation checks and balances to reduce risk.	• Offer objective feedback on client or third-party valuations. • Assess the reasonableness of fair value estimates. **Deliverables:** • Deloitte-branded cover letter. • Deloitte Transactions and Business Analytics signature. • Narrative describing observations and recommendations.



WE ALSO CAN PROVIDE ADDITIONAL SERVICES:

01

Objective opinions:

- Valuations as an objective specialist (e.g., mergers, spin-offs, non-cash contributions)
- Share valuations as established in bylaws or shareholders' agreements
- Litigation and arbitrage valuations
- Objective valuations for privatizations

02

Assets and securities valuation:

- Valuation of shares, businesses, debt instruments, and brands and other intangibles
- Joint-venture contributions
- Complex valuations, including highly leveraged businesses (management buyout, leveraged buyout)
- International projects and complex and illiquid assets
- Valuation of derivatives and structured credit products
- Valuation of unlisted investment portfolios to evaluate their development
- Valuation of real estate assets and industrial facilities

03

Tax valuation:

- Valuation services on companies, goodwill, know-how, brands and other intangibles, for tax purposes
- Valuation of stock options and other incentives
- Valuations for corporate restructuring
- Transfer pricing

04

Financial reporting:

- Fixed asset inventory reconciliation
- Property record outsourcing
- Fixed asset componentization
- Property insurance appraisal
- Machinery and equipment valuation
- Information technology fixed assets inventory services

05 Valuation consulting:

- Damage analysis and dispute contexts
- Evaluation of investment decisions
- Advice on the creation of value for the shareholder (value analysis, evaluation of value strategy, value management, value creation through the investment portfolio and invested capital management)
- Real options valuations
- Evaluation of strategic options

06 Fixed asset management and insurance:

- Fixed asset inventory reconciliation
- Property record outsourcing
- Fixed asset componentization
- Property insurance
- Appraisal
- Machinery and equipment valuation
- Information technology fixed assets inventory services

Valuation insights to power decision-making

With ValueD's interactive functionality, data visualization, and dashboards, you can generate insightful valuation analyses to tell "your story" by allowing you to drill down into valuation and business assumptions and underlying data sources.

Partnership administration and reporting services

INTEGRATED DATA SOLUTIONS FOR MODERN FAMILY OFFICES

Whether established or newly formed, family offices face new challenges: managing complex investment entries with series, side pockets, and special allocations with ever-growing spreadsheets, tracking allocations, and evolving ownership structures—all while facing prolonged staffing shortages.

We can help! Tap into our virtually unmatched accounting talent, market-leading technology, and leading practices built over decades of experience. Work with a trusted professional advisor who understands the complexity of managing family wealth and is committed to advising you about how to achieve your long-term financial goals.

Consolidate your data with elevated reporting and dashboards.

Streamline operations with our accounting talent and experience.

Support complex structures and allocations on Cascade Suite.

OUR SERVICES

We have a comprehensive suite of administration services that provide advice and recommendations tailored to meet the specific data management requirements, accounting, allocations, and reporting demands of family offices:

01 **Integrating investment data**

Advise on using files and data feeds, merging investment and bank data from multiple sources and financial institutions, comparing and aggregating values, and preparing data for accounting and reporting.

02 **Managing ownership structures**

Advise on tracking ownership interests, managing complex structures (including multi-tiered structures and side pockets), processing transactions, and producing capital call and distribution notices.

03 **Partnership accounting**

Provide advice and recommendations on trade and cash reconciliations; accounting services for partnerships, portfolio, and trusts; and production of general ledger reports and financial statements.

04 **Allocations and profits interest**

Provide advice on supporting book and tax allocations, tracking NAV (net asset value), calculating management fees and profits interests/promotes (including waterfalls).

05 **Reporting and stakeholder communications**

Provide advice and recommendations on standard and bespoke reporting through Excel, PDF, and interactive dashboards around holdings, performance, and partner statements that can be shared through our secure and mobile-friendly client portal.

06 **Employee compensation**

Provide advice on tracking carry and long-term incentive (LTI) plans, co-investment, and vesting. Advise on producing employee statements and letters.

OUR TECHNOLOGY

Cascade Suite is Deloitte's proprietary partnership administration and reporting services global platform that can be used to automate fund distribution and calculation workflows, integrate with the general ledger and other systems, perform scenario forecasting, calculate performance metrics, provide transparent reporting to investors and other parties, and add controls to processes that would otherwise be manual or untracked.

Enhanced reporting

Produce a wide array of engaging reports including partnership activity, general ledger, holdings, financial statements, and performance, enabling forecasting and real-time insights.

Digitized controls

Help reduce risk through segregation of duties; integrated approval logs; and automated data collection, reconciliation, ring-fencing, and secure storage.

Efficient processing

Save time, help reduce errors, and simplify the closing process with integrated data aggregation, inbuilt reconciliations, chart of accounts, and allocation rules housed within our database solution.

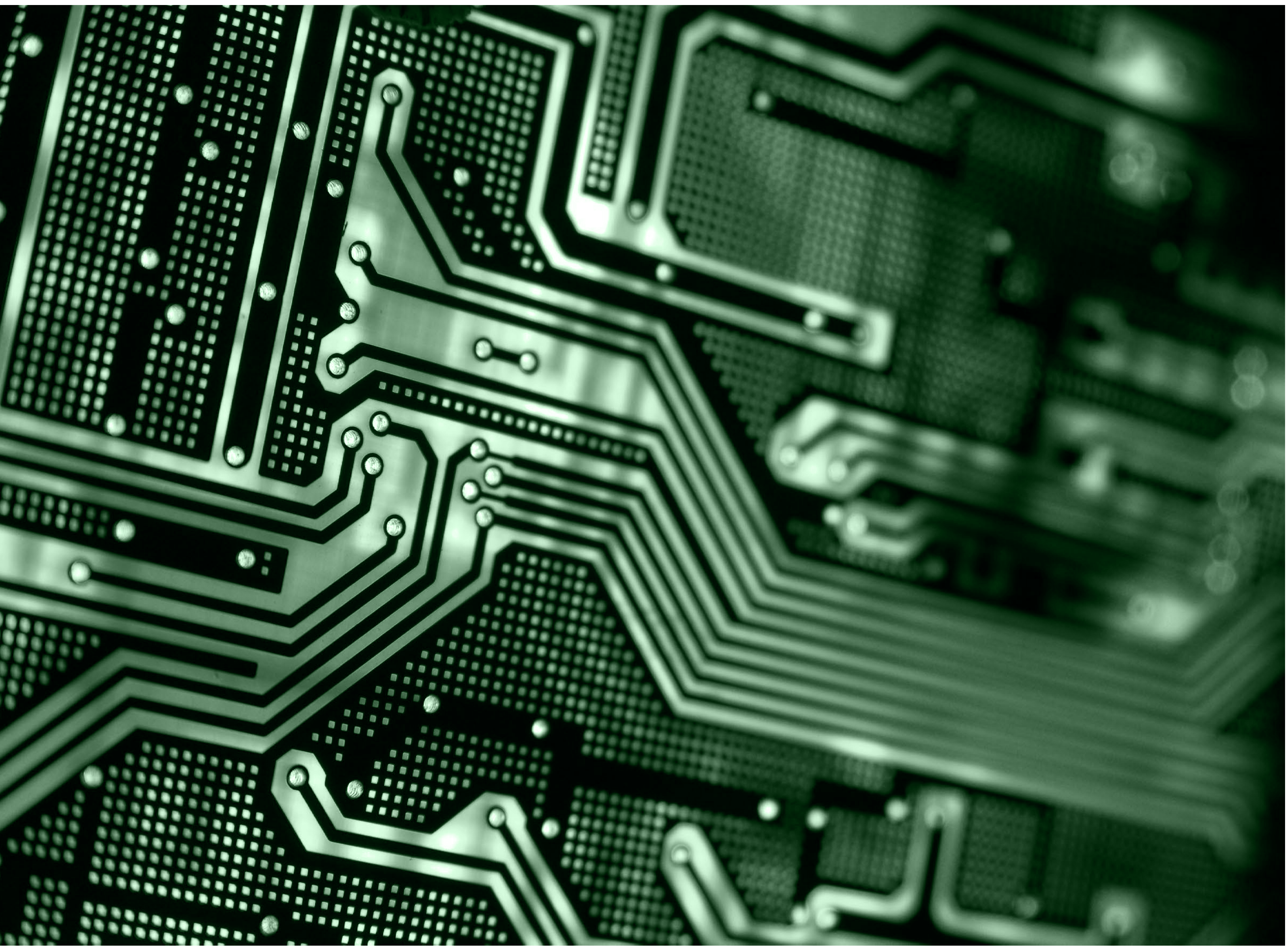
Elevated investor experience

Provide investors with a detailed wealth picture and rich communications through a combination of interactive dashboards, detailed reports, and integrated document storage accessible through our portal.

Payroll process solutions

ACCELERATE THE IMPACT OF PAYROLL

Whether you're grappling with inconsistent vendor support, payroll tax complexities, cost pressures, recruitment, retention, or bandwidth challenges, Deloitte can help you to navigate these issues at every level: local, regional, and global. As you modernize payroll processes and technology, enhance user experience, or expand your operations, our integrated payroll, tax, mobility, and advisory services—delivered through a flexible model and leading practices—can help you move faster, stay lean, and adapt as your business evolves, so payroll can become a strategic advantage.



PAYROLL PROCESS SOLUTIONS POWERED BY DELOITTE

ONE

Payroll tax

Payroll tax filing and advice for all your US jurisdictions, whether you use Deloitte for payroll or not.

- Employment tax registrations
- Tax calculations
- Payroll tax returns (e.g., Form 941, Form 940)
- Issuance of Forms W-2
- Tax notice triage and management
- Tax advisory services

TWO

Payroll support

Resources, tools, and technologies that can support your payroll team.

- Staff augmentation for standard or off-cycle payroll processing activities
- Complex payroll inputs relating to business travelers, remote workers, and the treatment of bonus and stock events
- Payroll instruction for internationally mobile employees

THREE

Payroll processing

High-quality payroll services provided by specialists.

- Gross-to-net calculations
- New hires and terminations
- Off-cycles
- Gross ups
- Pay statements and tax forms

FOUR

Global payroll

One global payroll provider. One technology. One seamless experience.

- Streamlined coordination of payroll operations across multiple jurisdictions
- Integration with global HR and financial systems for unified data management
- Consistent, high-quality service delivers efficiency and accuracy worldwide

Contact us

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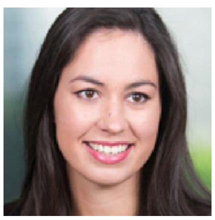

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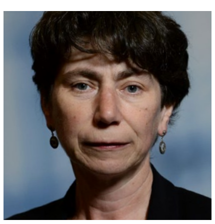

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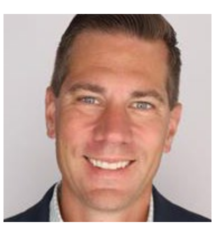
CROSS-BORDER FAMILY OFFICE SERVICES



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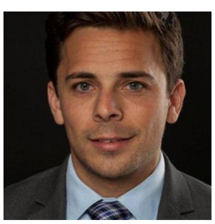
TAX COMPLIANCE AND TECHNOLOGY



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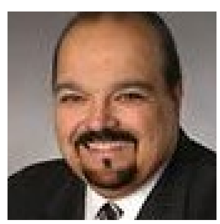

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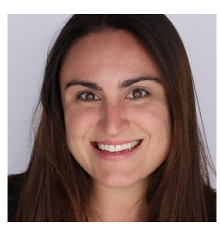

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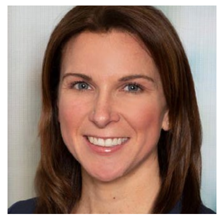

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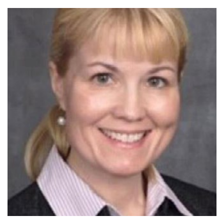

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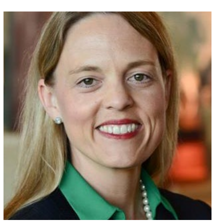

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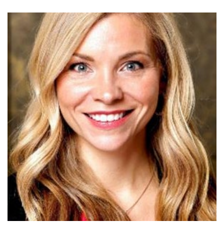

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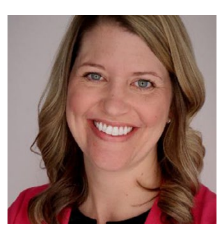

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