Private Client Services

The Private Client Services team at Weaver helps clients manage and preserve their personal wealth. Our clients can expect confidentiality, timely delivery of services, clear communication, accessibility, a depth of resources, a fiduciary mindset, a nonjudgmental perspective and dedication to educating the next generation. In addition, our Weaver team will coordinate with your advisors to address all of your financial needs.

Tax Compliance and Planning

- Tax planning and preparation
- International, federal and state and local tax
- Entity structuring

Family Office Services

- Bill paying and banking
- Cash management and budgeting
- Financial reporting
- Payroll services
- Internal control and security
- Coordinate with professionals
- Document management

Wealth Preservation

- Develop objectives
- Estate, gift and trust planning
- Philanthropy and legacy planning
- Retirement planning
- Asset protection
- Compensation planning

Family Succession Consulting

- Generational education and planning
- Next generation mentoring
- Family governance and succession

For more information contact:

Elizabeth Bunk, CPA, CFP
Partner, Tax Services
elizabeth.bunk@weaver.com
832.320.3220

Justin Reeves, CPA
Partner, Tax Services
justin.reeves@weaver.com
972.448.9247

For more information visit weaver.com.

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