Beachside:
3003 Cardinal Dr., Suite C
Vero Beach, FL 32963

Offutt Barton Schlitt LLC
CERTIFIED PUBLIC ACCOUNTANTS
A History of Professional Commitment

Downtown:
1605 19th Place
Vero Beach, FL 32960

P: (772) 231-2100 F: (772) 234-4333 W: www.CPAVeroBeach.com

Executive & Family Office Accounting Services

Family Office Accounting Services include:

- Goal planning review and analysis
- Budget planning and monitoring
- Cash flow projections and income analysis
- Expense analysis review and planning
- Monthly account reconciliation
- Monthly bill payment services
- Tax planning & preparation
- Health and Retirement Plan benefits review
- Estate and gift planning
- Review and monitoring of accounts, asset inventory, & allocations changes
- Monthly, quarterly, & annual reviews
- Summary review and compilation reporting
- Financial concierge services

Our mission is to provide our clients with exceptional services by taking initiative to be proactive advisors. We pride ourselves in developing tailored strategies to meet the specific needs of our clients.

Family Office Accounting

For some businesses and family groups, it's difficult to keep up with the day to day management of their personal finance needs. From budget planning and paying bills, to organizing your accounts and supporting your professional and family relationships, Offutt Barton Schlitt provides a solution to help safeguard corporate or family assets that can be tailored to your needs.

Our Family Office Accountants are dedicated to ensuring our clients can enjoy peace of mind and that their day to day financial needs are being met. We work closely with our clients on a comprehensive and consistent basis, with the utmost focus on our clients' overall financial well-being.

Financial Concierge Services

As part of our Family Office Accounting services, Financial Concierge Services are provided as value added support to our clients financial accounting needs. By addressing client concerns and advocating on our clients behalf, we are uniquely positioned to facilitate the communication and support needed to resolve and execute our clients' family accounting needs.

Lending support where needed, our Family Office Accountant communicates with clients trusted partners, family members, investment advisors, attorneys, and caregivers, to ensure their comprehensive financial goals and objectives are understood and met. Concierge services help our clients complete actionable financial items, from document review and completion, to account maintenance and reconciliation, with a focus on our their needs and overall financial wellness.