For decades, individuals and families of distinctive wealth have trusted the Eideard Group to provide its full-spectrum of family office and wealth management services to preserve and grow their financial assets.

Taking Client Service to Unparalleled Levels

How can we help? As part of providing family office and wealth management services, we can help you find more time to enjoy life, reduce stress, or increase peace-of-mind while maintaining clarity about all the details associated with your financial affairs.

Can we help you with your estate planning or insurance needs…?

How about with constructing or purchasing a home… or assistance with strategies to minimize taxes?

Or maybe you're buying something special…?

All of these things are important issues that must be planned for and managed in the same way that your wealth and investments are managed. We understand this. And our entire team of professionals is here to help.

Think Outside-of-the-Box

As part of our family office and wealth management practice, we are pleased to provide ***concierge services*** that take traditional client service to another level. Simply-stated, we are happy to support whatever it is that's important to you. Think "outside-of-the-box" about what you and your family might find helpful or convenient, such as help with:

- **Educating your children or grandchildren about how to save, invest & preserve money**
- Synchronization of financial documents for tax preparation or mortgages
- **Access to helpful information via our professional network (CPAs, Attorneys, etc.)**
- Coordination of life and financial documents or plans with your advisors (CPA, Attorney, etc.)
- **Proprietary, simplified reporting for businesses or individuals**
- Help with other personal or family pursuits…just ask! If it can be done, it will be our pleasure!

We hope you will think of the Eideard Group as your source of personal financial and life assistance — relieving you of everyday burdens ranging from basic financial housekeeping to a wide range of personal interests or family pursuits. Whatever it is, we'll do our best to help!

Private Investment Opportunities	Coordination with your Advisory Team
Legacy & Wealth Transfer Planning	Philanthropic Planning
Real Estate Purchase & Transfer	Consulting & Key Introductions

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