

Plumb Family Office Accounting Services

Accounting

- Bill Payment
- Bank & Credit Card Reconciliation
- Monthly Financial Statements
- Cash Flow Management
- Personal Financial Reporting & Analysis
- Payroll Services
- Budgeting
- Cost Analysis
- Foundation Accounting
- Trust Accounting
- Insurance Coordination & Oversight
- Annual Tax Organizer

Personal & Executive

- Personal Concierge
- Calendar Management
- Appointment Setting
- Travel Arrangements
- General Errands
- Mail Services
- Vendor Management
- Property Management
- Household Staff Management
- Project Management
- Relocation Assistance
- Deliver/Repair Waiting