



L I F E
D E F I N E D



OUR **PERSONAL CFO** SERVICES

Our unique personalized service as a **PERSONAL CFO** to you, your family and/or family office knows no bounds. We offer concierge-style sophisticated services to meet the needs of the unique and complicated life of our clients. We help some of America's most enterprising individuals and families define the lives they choose to live. NKSFB provides our clients the expertise to protect and collect all that they have earned, and equips them with tools necessary to succeed short and long-term. We can also function as your family office.

We serve enterprising individuals, including entrepreneurs, high net worth individuals, corporate executives and business owners in a wide range of industries throughout the United States.

NKSFB provides experienced, calculated and confident solutions based on solid planning and disciplined execution, all of which are completely and openly accountable to our clients.

Our dedicated team of professionals offer Personal CFO services to their clients, led by a partner at NKSFB with decades of success in the industry.

NKSFB's Personal CFO services can help you address the needs of your and your family's life... **AS YOU DEFINE IT.**

Contact:

Mickey Segal

10960 Wilshire Blvd., 5th Floor
Los Angeles, CA 90024
310.229.5101
msegal@nksfb.com

Dian Vaughn

555 California St., Suite 4925
San Francisco, CA 94104
415.463.1313
dvaughn@nksfb.com

www.nksfb.com

OUR PERSONAL CFO TEAM PROVIDES AN EXTENSIVE MENU OF SERVICES FROM WHICH TO CHOOSE, INCLUDING:

ACCOUNTING SERVICES

- Budgeting, projection of expenses, accounting of revenue, insurance and payment of bills
- Financial record keeping
- Depositing of all income
- Managing and monitoring check receipts and bill payments
- Negotiation of real estate and major asset acquisitions

MANAGEMENT & PLANNING

- Cash flow management and planning
- Tax planning and compliance
- Debt planning
- Estate planning
- Planning transfer of wealth from generation to generation

SPECIALTY SERVICES

- Review of contracts
- Risk management
- Investment review
- Obtaining insurance coverages
- Arranging financing and speciality insurance for your luxury items



Nigro Karlin Segal Feldstein & Bolno



L I F E
D E F I N E D



OUR **PERSONAL CFO** SERVICES

Our unique personalized service as a **PERSONAL CFO** to you, your family and/or family office knows no bounds. We offer concierge-style sophisticated services to meet the needs of the unique and complicated life of our clients. We help some of America's most enterprising individuals and families define the lives they choose to live. NKSFB provides our clients the expertise to protect and collect all that they have earned, and equips them with tools necessary to succeed short and long-term. We can also function as your family office.

We serve enterprising individuals, including entrepreneurs, high net worth individuals, corporate executives and business owners in a wide range of industries throughout the United States.

NKSFB provides experienced, calculated and confident solutions based on solid planning and disciplined execution, all of which are completely and openly accountable to our clients.

Our dedicated team of professionals offer Personal CFO services to their clients, led by a partner at NKSFB with decades of success in the industry.

NKSFB's Personal CFO services can help you address the needs of your and your family's life... **AS YOU DEFINE IT.**

Contact:

Rich Feldstein

rfeldstein@nksfb.com
212.765.3200

Joe Press

jpress@nksfb.com
631.753.6200

Jon Leffel

jleffel@nksfb.com
212.765.3265

810 Seventh Ave., Ste. 1701
New York, NY 10019

500 Bi-County Blvd., Ste. 201
Farmingdale, NY 11735

www.nksfb.com

OUR PERSONAL CFO TEAM PROVIDES AN EXTENSIVE MENU OF SERVICES FROM WHICH TO CHOOSE, INCLUDING:

ACCOUNTING SERVICES

- Budgeting, projection of expenses, accounting of revenue, insurance and payment of bills
- Financial record keeping
- Depositing of all income
- Managing and monitoring check receipts and bill payments
- Negotiation of real estate and major asset acquisitions

MANAGEMENT & PLANNING

- Cash flow management and planning
- Tax planning and compliance
- Debt planning
- Estate planning
- Planning transfer of wealth from generation to generation

SPECIALTY SERVICES

- Review of contracts
- Risk management
- Investment review
- Obtaining insurance coverages
- Arranging financing and speciality insurance for your luxury items



Nigro Karlin Segal Feldstein & Bolno