



Argent Family Wealth Services

Argent Family Wealth Services (AFWS) is a specialized team within Argent delivering specialized wealth management services for clients with unique or complex wealth planning needs.

As part of your wealth advisory team, AFWS can employ some or all of the following services to provide long-term financial stability and growth for your family or family business:

Financial Planning:

- Strategic planning for complex financial, legal, tax and accounting needs
- Individualized planning for each family member
- Implementation and monitoring of plan(s)

Investment & Wealth Management:

- Custom portfolio design, implementation, management and IPS development
- Open platform with blend of internal and outside managed strategies
- Outsourced Chief Investment Officer (OCIO) services
- Broad access to alternative and non-traditional investment options
- Enhanced cash and short-term liquidity management services
- Detailed performance reporting on traditional and unique and directed assets

Estate, Trustee & Fiduciary Services

- Comprehensive estate plan development assistance
- Implementation of processes to minimize transfer tax and income tax
- Cash flow analysis
- Detailed accounting of principal and income
- Detailed accounting for unique assets
- Bill paying services
- Domestic staff hiring and monitoring
- Tax return coordination, quarterly estimates and payment of tax due
- Compliance with state and federal trust statutes
- Objective and prudent exercising of trustee discretion
- Recordkeeping for personal property
- Estate settlement

Oil & Gas Mineral Management

- Contract negotiation for mineral leases, surface and water rights, well locations, etc.
- Asset evaluation, including mineral inventories, lease schedules and property mapping
- Payment auditing, royalty accounting, division order verification and 1099 verification
- Ongoing management, such as monitoring exploration and tracking and analyzing production

Real Estate Management:

- Evaluation of risks associated with real property
- Assessment of insurance needs, coverage and premiums
- *List continues on next page*

Real Estate Management, *continued*:

- Management and/or coordination of repairs, maintenance and improvements
- Collection and tracking of rental income and expenses
- Timely payment of property taxes
- Farm and ranch management
- Qualified Intermediary (Like-Kind Exchange) services

LLC and Closely Held Business Management:

- Partnership accounting (to include tracking ownership, contributions and distributions)
- Performance reporting
- Coordination of income taxes
- Scheduled review of financial condition, management, earnings, growth and marketability
- Recommendations on retention or sale of ownership interests
- Succession planning, including value acceleration, transition planning and exit option analysis
- Employee Benefit Plan consultation and administration
- Employee Stock Ownership Plans (ESOPs), including transaction consultation and administration, ongoing plan administration, successor trustee and special fiduciary
- Representation of interests held in trust at board meetings (when appropriate)

Philanthropy:

- Evaluation, planning and coordination of charitable giving (donor-advised funds, direct giving, or family foundation)
- Support of multi-generational objectives
- Donor-advised funds (DAFs)
- Personal giving programs
- Charitable giving education
- Family Foundation Administration:
 - Operational support
 - Full trustee services (investment management, accounting, administration)
 - Issuance of annual distributions to charitable organizations
 - Issuance of gift notices
 - Coordination with recipients to obtain receipts for tax compliance
 - Coordination of tax return preparation and filings

Legacy Planning:

- Establishing family objectives
- Family governance, communication and engagement support
- Family meeting facilitation
- Age-appropriate next generation education

About Argent Financial Group

Argent is a leading, independent, fiduciary wealth management firm responsible for more than \$35 billion of our clients' assets. Headquartered in Ruston, Louisiana, Argent was formed in 1990 and traces its roots back to 1930.

For more information, visit [ArgentFinancial.com](https://www.ArgentFinancial.com).