

# FINANCIAL MANAGEMENT

Our Financial Management service - as part of The Private Office at Sopher + Co - provides a hands-on approach, offering assistance, advice and support.

Following an initial meeting, we will work with you to establish a tailored service that encompasses all your financial administrative requirements.

The service includes:

- Handling bill payments in a controlled and systematic manner
- Managing the running of expenses
- Organisation and management of financial documents
- Secure storage of important financial documents
- Preparation of an initial personal cash flow and updating at requested intervals
- Providing an overview of historical and future expected spending
- Providing support for collating information for personal tax return purposes, including property rental statements
- Managing a list of contacts and/or suppliers to collate information
- Acting as a correspondence address and point of contact for suppliers

## **Sopher + Co Net Worth Statement**

For those who would like a complete overview of their wealth, we can work with you to create your Net Worth Statement using a report that has been designed specifically for Sopher + Co.

This report will give you a breakdown of all assets and liabilities - and can be updated quarterly, or more regularly should you prefer, to ensure you have a complete handle on your finances.

## **Liaising with Internal Departments at Sopher + Co**

By working in partnership with you in the management of your finances, we can liaise across the firm's other departments to ensure that all your financial requirements are met. Whether it is for information gathering or instructing payments to HMRC, we will take care of everything allowing you more time to focus on other areas such as running your business.

To arrange your complimentary 30 minute consultation to discover how our services may benefit you, please contact: [theprivateoffice@sopherco.com](mailto:theprivateoffice@sopherco.com).

# SOPHER+CO

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