As a business owner or executive, you know that a well-qualified, experienced CFO is one of the most valuable assets in your organization. This key role is responsible for managing many aspects of running a business and the financial reporting to "higher management" – most often, to the CEO and/or the Board of Directors.

At Smith & Howard Wealth Management we also believe that it equally important to manage your personal wealth as strategically as you manage your business. We take an all-encompassing view of your personal wealth and goals to provide you with a plan that can help ensure you reach those goals. We become, in essence, your family CFO.

See how our CFO duties compare to the typical businesses' CFO:

Action/Report	Business CFO	Your Family CFO
Balance Sheet	Measures business health, stability, progress and leverage (carried at cost)	Measures family's financial health, stability, progress and leverage (carried at fair market value)
Income Statement/Tax Return	Measures profitability	Monitors family income and expense levels
Cash Flow	Measures cash flow generation and uses	Measures cash flow generation and uses; spending, taxes, savings
Projections	Business forecast	Retirement plan
Risk Management	Property and casualty insurance; business interruption; liability	Income replacement due to death or disability; liquidity for estate taxes; liability coverage
Asset Protection	Corporate and partnership structures	Estate planning and entity planning
Goal Setting	Plan for future and desired results	Plan for future and desired results
Budgets	Track budget to actuals	Track budget to actuals
Investing	Manage assets to help achieve goals with acceptable level of risk	Manage assets to help achieve goals with acceptable level of risk

Our Chartered Financial Analysts, Certified Financial Planners and Certified Investment Management Analyst bolster our CFO credentials with the expertise and ability to provide well-rounded insights and advice to help clients meet their short and long-term wealth goals.

Perhaps the most appealing aspects of our CFO services are that we approach and present them to our clients in a way that provides a streamlined view and guide for their financial strategies. Our team combines expertise and knowledge of each client's goals to create a strategy that is both understandable and sensible to implement. And we stay with you every step of the way – analyzing, adjusting, advising and reporting.

So, just as you look to the CFO of your business for key advice and execution, look also to "*Your Family CFO*" at Smith & Howard Wealth Management for your personal wealth management.

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