MARTIN, DECRUZE
& COMPANY LLP
Certified Public Accountants

CUSTOMIZED SOLUTIONS
to help you conveniently manage your wealth.

Supporting the goals of each unique client – to simplify your life and make your time more productive.

Many wealthy families and individuals are constantly navigating a complex maze of tangled investments, documents, advisors, and obligations. Their demands keep escalating and competing for priority. All too often, they are forced to micromanage the various pieces of the financial management process.

MD&Co. is here to change all that. As your personal CFO, we work hand-in-hand with your chosen professionals to coordinate your activities and align them with your short and long-term strategies. Our goal is to make your life easier, provide you with timely access to accurate information, and focus on your family's unique interests and needs.

Confidential Services

Your financial and personal objectives are different from your neighbor's or the family down the street. **MD&Co.** understands. Our advisors understand where you want to go and align our approach and recommendations to your long-term goals. Among our areas of expertise:

- **Financial management**
- **Tax and accounting services**
- **Estate planning and administration**
- **Retirement planning**
- **Asset protection and insurance**
- **Personal family office services**

Financial Management

MD&Co. simplifies your life by managing your day-to-day financial obligations – including your bills – and providing you with critical monthly expense summaries as well as reports on net worth, cash flow, and consolidated investments.

You and your family can rest assured that your most important documents – wills, insurance policies, trust agreements, birth certificates, bank account information, and more – will be organized in a safe environment.

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MARTIN, DECRUZE & COMPANY **2777 Summer Street, Suite 401, Stamford, Connecticut 06905-4324**
Phone: (203) 327-7151 Fax: (203) 977-8314 www.mdcocpa.com

Tax and Accounting Services

One of our goals at **MD&Co.** is to help you legally keep more of what's rightfully yours. Our accounting professionals maintain complete books and records and provide tax planning and tax preparation services:

- **Individuals and families**
- **Private foundations**
- **Family limited partnerships**
- **Estates and trusts**
- **Payroll filings for household employees**

Estate Planning and Administration

With just a little advanced planning, you can help ensure that your estate is passed on to those you care about, without being eroded unnecessarily by estate and gift taxes. Working with your estate attorney, we assist in arranging for seamless wealth transfer to the next generation.

Retirement Planning

The U.S. Department of Labor has determined that you need 70 percent of your income to keep up with your current living standards upon retirement. We work cooperatively with your investment professional to help you build, manage and retain your assets by putting together a retirement roadmap. In addition, our tax team can provide guidance on IRAs, Roth IRAs and other Retirement Plans.

Asset Protection and Insurance

Financial emergencies can occur and we can help ensure you are protected. Our licensed insurance professionals perform forensic reviews on your existing insurance policies and provide recommendations toward improving coverage or cost. We also assist in the selection of life, disability, and personal liability insurance protection.

Personal Family Office Services

Our comprehensive family office services range from rental property management to personalized concierge services so you can free up more time and concentrate more on your family and the other good things in life.

About Our Firm

For over 25 years, **Martin, DeCruze & Company, LLP** has built its core foundation on the value of relationships and the ability to provide private equity firms with close personal attention coupled with the best critical thinking and resources. Through years of experience as a respected certified public accounting firm – combined with continuing professional education, state-of-the-art technology, and an extensive network of business relationships – our staff delivers the solutions to help your firm operate efficiently with all the benefits of a full-fledged accounting department.

Our comprehensive business consulting services provide private equity clients with vital competitive advantages. We add consistent value to your firm by efficiently and reliably providing audit, accounting, tax, and business consultancy services to those who manage investor funds and investment portfolios. As a result, management is free to focus on the best possible returns for investors.

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