Baldwin Brothers

FAMILY OFFICE SERVICES

Less Stress More Joy

Our full suite of Family Office Services will help you enjoy life right now and find peace of mind long into the future.

The experience of managing wealth is never the same for any two individuals or families. It can be invigorating for some, and overwhelming for others. But in every case, wealth management comes with a lot of responsibility; for families, and for next generations – some of whom are learning how to navigate an increasingly complex financial environment.

We offer a generous array of services for you and your family – all designed to help you minimize stress and maximize joy. From financial management and education, to unique lifestyle services, we've been working to make every day easier, and every future brighter.

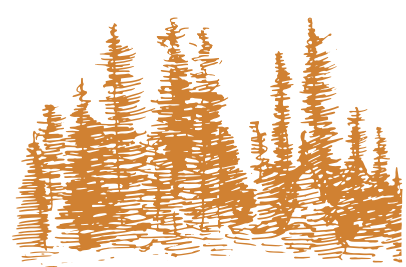
How can we help?

PERSONAL FINANCIAL MANAGEMENT

- Analyze cash needs and develop and maintain income and expense projections and cash flow
- Prepare statement of net worth: balance sheet, income statements, and budgets
- Bill pay and cash transfers
- Fiscal education of next generation

CUSTOMIZED REPORTING

- Comprehensive investment performance and asset allocation reporting
- Performance reporting against benchmarks
- Administration and oversight of alternative and direct investments



TAX COORDINATION

- Coordinate tax planning
- Consolidate and present tax forms
- Coordinate and process estimated quarterly tax payments
- Create tax minimization strategy
- Cost basis tracking and reporting

ESTATE MANAGEMENT & STRATEGIC WEALTH TRANSFER

- Establish procedures to provide decision-making authority and controls for strong governance
- Foster communication among family leaders, stakeholders, and professional advisors
- Coordinate meetings with professional advisors
- Ensure that family members are protected from liabilities with necessary insurance coverage

PHILANTHROPIC PLANNING

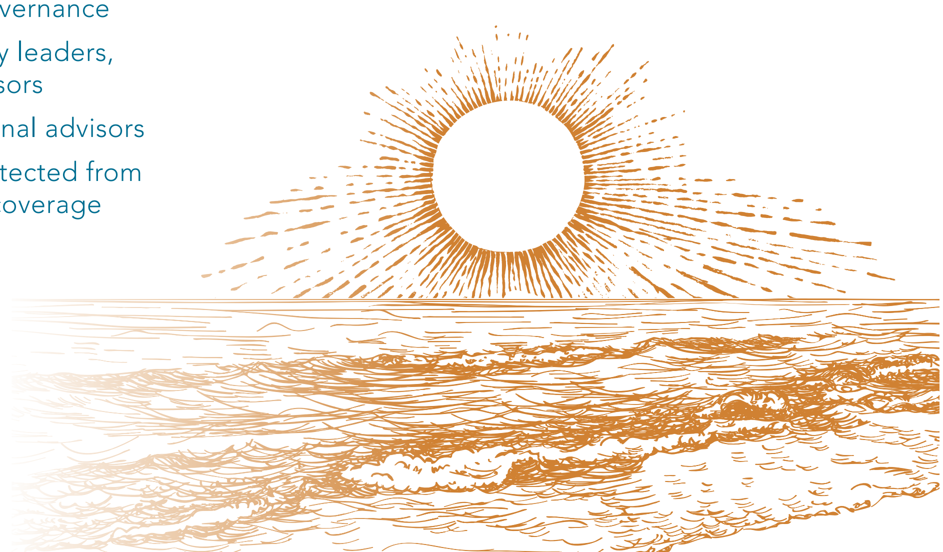
- Charitable administration
- Foundation management
- Education of next generation

LIFESTYLE MANAGEMENT

- Residential property management
- Payroll setup and processing
- Property, casualty, and liability insurance review
- Travel management

EDUCATION

- Next generation financial planning and strategies
- Personalized fiscal education
- Lifestyle strategies and counsel



Baldwin - The Evolution of Investment

Genuine relationships and personal attention are the hallmark of the Baldwin experience. We've made lasting relationships that span generations because again and again we choose people over products, and family-impact over fast wins. You'll feel the difference the minute you meet us, and every single time for years to come.

Deliberately-sized and decidedly innovative, our high-touch, holistic, and collaborative approach puts you in a much better position to have a positive impact in ways that matter to you and your family. Unlike larger firms, trust departments and banks, we offer the flexibility to structure individual portfolios to address your unique priorities, risk tolerance, and tax situation, and provide a generous suite of services to help you live life to the fullest.

WE INVITE YOU TO START YOUR EXPERIENCE TODAY

Stop by and see us: 204 Spring Street, Marion, MA 02738 | **Email:** info@baldwin-llc.com

Additional information, including management fees and expenses, is provided on our Form ADV Part 2, available upon request or at the SEC's public disclosure website, www.adviserinfo.sec.gov. Past performance is not a guarantee of future results.

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