

Your Personal Virtual Family Office

The Rockefellers, Gates, and Waltons all use Family Offices—teams of specialists who work together. Until now, you needed \$250M+ to access this level of coordinated planning. Today, our Virtual Family Office brings you the same value without the massive cost.

WE COVER EVERYTHING YOU NEED

Examples Include:



Tax Planning

- ✓ Advanced tax strategies your CPA never mentioned
- ✓ Charitable structures that benefit you AND charities
- ✓ Business tax optimization
- ✓ Tax credit opportunities

Business Advisory

- ✓ Exit strategy development
- ✓ Succession planning that protects family
- ✓ Business valuation optimization
- ✓ Growth acceleration strategies
- ✓ Operational improvements

Risk Mitigation

- ✓ Asset protection before lawsuits hit
- ✓ Insurance gaps most agents miss
- ✓ Litigation shields
- ✓ Privacy preservation
- ✓ Coordinated coverage analysis

Wealth Management

- ✓ Alternative investments
- ✓ Tax-efficient portfolio design
- ✓ Retirement optimization
- ✓ Private market access
- ✓ Institutional strategies

Legal Services

- ✓ Trust structures that protect generations
- ✓ Entity formation for maximum protection
- ✓ Family governance frameworks
- ✓ Tax-efficient wealth transfers
- ✓ Coordinated legal strategies

HOW A VIRTUAL FAMILY OFFICE WORKS

Step 1: Discover

You take 10-minutes to complete our proprietary VFO Diagnostic, automatically identifying opportunities across all areas of your personal and business landscape



Step 2: Coordinate

Your dedicated Proactive Planning Team assembles the exact specialists you need from our Virtual Family Office



Step 3: Execute

Seamless implementation of coordinated strategies with one point of contact overseeing everything



Your Personal Virtual Family Office

One Relationship. Complete Solutions. Coordinated Specialists.

THE CHALLENGE SUCCESSFUL INDIVIDUALS & BUSINESS OWNERS FACE:

- ❌ Multiple advisors who don't communicate, creating gaps and redundancies
- ❌ Paying unnecessary taxes because strategies aren't coordinated
- ❌ Wealth at risk without proper protection structures in place
- ❌ Missing opportunities that require specialized expertise
- ❌ Spending too many hours managing various professionals

THE VIRTUAL FAMILY OFFICE ADVANTAGE:

- ✅ One trusted advisor coordinating 75+ specialists under a unified strategy
- ✅ Proactive planning that captures every tax saving and growth opportunity
- ✅ Institutional-level strategies previously reserved for ultra-wealthy families
- ✅ Complete transparency with regular reporting and communication
- ✅ More time for what matters—your business, family, and passions

READY TO EXPERIENCE THE DIFFERENCE?

Devji Family Office helps successful families build, protect, and transfer wealth. Through our Virtual Family Office model, we bring together the exact specialists you need—when you need them—all coordinated through one trusted relationship. No more missed opportunities. No more fragmented advice. Just comprehensive wealth solutions designed specifically for you.

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**DEVJI
FAMILY OFFICE**
WEALTH PLANNING & TAX STRATEGIES