



whitleypenn

FAMILY OFFICE SERVICES

Personalized Support for Complex Wealth

Whitley Penn's Family Office Services help individuals and families navigate complexity with confidence. Working alongside your existing advisors and support network, we provide integrated tax, advisory, technology, and family office solutions designed to preserve wealth, strengthen operations, and protect what matters most.

How We Support Family Offices

Our multidisciplinary team provides coordinated solutions tailored to your family's financial, operational, and legacy planning needs.

Family Office Operations

- Financial operations & advisory
- Fund accounting & investor reporting
- Technology strategy & transformation
- ERP systems & process optimization
- Risk management & compliance

Financial Strategy

- Tax strategy & compliance
- Business valuations
- Investment & wealth planning
- Transaction & M&A advisory

Legacy & Governance

- Governance & family stewardship
- Generational wealth transfer
- Next-generation leadership
- Philanthropic legacy planning

Our Trusted Family Office Technology Partners



Your Future Is Our Focus

What Makes Our Family Office Services Different?

Managing significant wealth often requires more than tax planning or investment oversight. Family offices face complex operational, financial, technology, governance, and succession challenges that benefit from a coordinated team of advisors working toward a common goal.

Learn more:



Integrated Family Office Support

Our professionals work across advisory, tax, technology, fund administration, and wealth planning to provide coordinated solutions under one roof.

Operational and Financial Experience

From accounting and reporting to process improvement, ERP systems, and technology strategy, we help family offices operate with greater efficiency and visibility.

Focused on Legacy and Stewardship

We help families navigate governance, next-generation leadership, wealth transfer, and long-term legacy planning with clarity and confidence.

Contact an Advisor to Get Started



Irfan Dossani
Partner-in-Charge
of Advisory



Ashley Kimery
Family Office
Industry Leader



Eric Goff
Tax Partner



Bryan McClune
WPWealth Partner



John Yeager
ERP
Managing Director



Katie Peck
Fund Administration
Managing Director

