

Special Projects and Services

Additionally, there are services and projects where we leverage our strategic partnerships to deliver integrated solutions that go beyond the operational capacity of Story Capital.

Collaborative Services with our Strategic Partners (additional fees will apply)	
Financial Coordination Services:	Concierge/Personal Assistant Services:
<ul style="list-style-type: none"> <input type="checkbox"/> Trust administration and accounting services (Family Bank Administration) <input type="checkbox"/> Estate and probate execution <input type="checkbox"/> Financial organization: Bill payment and personal accounting <input type="checkbox"/> State residency documentation tracking for MN expatriation <input type="checkbox"/> Budgeting and expense tracking <input type="checkbox"/> Foreign tax reporting and compliance (FACTA & FBAR) <input type="checkbox"/> Transaction management (large purchases, businesses interests, bank financing) <input type="checkbox"/> Household payroll accounting and filing <input type="checkbox"/> Real estate management and accounting <input type="checkbox"/> Charitable gift grant management and coordination <input type="checkbox"/> Tax document organization 	<ul style="list-style-type: none"> <input type="checkbox"/> Household Management <input type="checkbox"/> Vendor/residential employee management <input type="checkbox"/> Calendar management <input type="checkbox"/> Travel coordination <input type="checkbox"/> Event planning (birthdays, weddings, anniversaries, business, special occasion) <input type="checkbox"/> Home organization (closets, garages, basements etc.) <input type="checkbox"/> Mail handling and bill organization <input type="checkbox"/> Creating a functional personal filing system <input type="checkbox"/> Personal shopping/errands <input type="checkbox"/> Establishing an online banking and bill payment system <input type="checkbox"/> Establishing a personal accounting system <input type="checkbox"/> Project management