

Morgan Stanley

Bookkeeping

Simplify the complexities of personal finances with bill pay, tax filing and expense management. Custom cash flow reports and tailored bookkeeping, working in tandem with your CPA and Financial Advisor to streamline your financial life.

SCALABLE SERVICES

Your personal expense management needs may become more or less complex as your life changes and your family grows. Your Financial Advisor can call upon professionals to help you stay in control as circumstances change. This can be as simple as paying your monthly bills in an orderly fashion, or as complex as managing the expenses associated with multiple residences around the world, yachts, planes and more.

BOOKKEEPING AND BILL PAY SERVICES

- Bill payment
- Personal bookkeeping
- Household payroll and tax filings
- Bank reconciliation
- Customized cash flow reports
- Year-end special reports related to tax items
- Specialized services for athletes and entertainers
- International services to manage expenses for overseas residences and/or employees

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