

## **INVESTMENT AND FINANCIAL ADMINISTRATION SERVICES**

**Championship Financial Advisors** is an outsourcing solution for families seeking the expertise of a Chief Financial Officer and the functionality of a Finance Department. The firm provides both routine and specialized financial administration services via software interfaces and day-to-day interaction with family members and their existing network of professionals:

### **Service Package**

Accounts Payable Management  
Accounts Receivable Management  
Asset Acquisitions & Sales  
Bank Balance Verification  
Bank Statement Reconciliations  
Bill Paying (Home Pickup)  
Cash Flow Forecasting  
College Savings Plans  
Counseling  
Credit Card Statement Reconciliations  
Customized Financial Reports  
Debt Management  
Estate Plan Coordination  
Financial Records Storage  
Financial Statements  
Insurance Coordination  
Investment Management  
Investment Supervision & Reporting  
Invoicing  
Loan & Lease Negotiations  
Personal Financial Software Training  
Personal Spending Plans  
Precious Metals Investments  
Retirement Plans  
Tax Return Coordination

### **Benefit**

For small businesses including home-based businesses  
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Analyze deals; attend closings  
Performed daily; eliminates overdrafts  
Categorize all checks written; resolve bank errors  
Bills paid on time; minimizes late fees; improves credit history  
Clarifies the big picture  
Set-up advantageous plans; administer withdrawals  
Analyze reasons for overspending  
Categorize all credit card charges; resolve fraudulent charges  
Lets you know where the money went  
Reduce dependence on debt; work out repayment plans  
Interface with estate attorneys and CPAs to minimize estate taxes  
All financial & legal documents held in our office files; easy retrieval  
Provide on demand to bankers, lenders, insurance companies, etc.  
Interface with insurance agents; screen all proposals  
Build & manage customized portfolios; provide detailed client reports  
Supervise 3<sup>rd</sup>-party managers; analyze performance  
For spouse's home-based business  
Shop & analyze deals; attend closings  
For spouse  
Create & oversee a disciplined spending plan  
Acquire, store & manage bullion & rare coin investments  
Coordinate set-up of advantageous plans; manage the assets  
Prepare all info for CPA; meet filing deadlines

Troubleshooting with Banks, Credit Card Companies, Insurance Claims, Service Providers, etc.