Virtual Family Office Partnership

Transform Your Accounting Firm. Serve Your Clients Beyond Basic Tax Planning. Share in Revenue.

SIMPLE 3-STEP PROCESS

Step 1: Identify Need

You recognize a client need beyond your traditional services

Step 2: Connect Team

Your VFO Liaison helps you select the exact specialists needed from your Virtual Family Office

Step 3: Share Revenue

The VFO coordinates the solution while you maintain relationship control and share in all revenue

INSTANT ACCESS TO 75+ SPECIALISTS

Examples Include:

Tax Planning

- Charitable Remainder Trusts
- Solar, Oil & Gas, DSTs, Other
- Opportunity Zones
- Cash Balance Plans
- 1031 Exchanges
- Tax Credits
- Tax Resolution
- Equipment Leasing Strategies

Business Advisory

- Exit & Succession Planning
- Business Value Acceleration
- Dynamic Valuations
- Technology Transformation
- Operational Improvement
- Financial Management
- Strategic Business Planning
- Sell Side Services & M&A

Risk Mitigation

- P&C Insurance
- Captive Insurance
- Living Too Long
- Dying Too Soon
- Physical Accidents
- Theft
- Cybersecurity

Wealth Management

- Real Estate
- Crypto
- Art
- NFTs
- Alternative Investments
- Retirement Planning
- Financial Planning
- Craft Portfolio Management

Legal Services

- Estate Planning
- Entity Formation & Restructuring
- Contract Creation
- Resolving Disputes
- Mergers & Acquisitions
- Employment Law

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THE REALITY EVERY ACCOUNTANT FACES:

- ❌ Work-life balance is non-existent and retirement feels impossible
- ❌ Your best clients need advanced tax strategies you can't provide
- ❌ Business advisory, risk mitigation, wealth management & legal service requests go unfulfilled
- ❌ Clients find other providers that don't coordinate advice with you... or worse, live with unsolved problems
- ❌ Revenue walks out the door with every referral

THE VIRTUAL FAMILY OFFICE SOLUTION

- ✅ Offer every specialized service your clients need—without hiring a single employee or referring out
- ✅ Maintain control of client relationships while accessing 75+ vetted specialists
- ✅ Generate passive revenue streams that build wealth while reducing workload
- ✅ Access advanced tax strategists who save clients $100K+ under YOUR brand
- ✅ Become the accounting firm that can solve everything—keeping clients forever while getting revenue share from services you don't currently provide

READY TO STOP REFERRING REVENUE AWAY?

Eric, Josh, and the Sooner Private Financial team work in the Virtual Family Office model along side accountants and EAs to bring together the exact specialists your clients need—when they need them — all coordinated through a trusted team. No more missed opportunities. No more fragmented advice. Just comprehensive financial services solutions designed specifically for your clients.

Talk to Us