Montgomery Coscia Greilich LLP

Family Office Services

OUR FIRM

Montgomery Coscia Greilich LLP (MCG or the Firm) is a full-service professional accounting firm with expertise in traditional accounting services as well as transaction advisory, financial advisory and strategy/management consulting.

Our Firm recognizes the ultimate success in meeting your financial objectives depends on the advisors that surround you. At MCG, we follow a policy of professional teamwork. With individual areas of specialized skills, knowledge, experience and interests, our Firm functions as a team to achieve our common goal: ***maximum performance and value for our clients***.

MCG Family Office Services

Knowing the various aspects of your financial life are often dynamic and multi-faceted, we specialize in understanding your unique set of circumstances and specific needs.

Our clients enjoy the following benefits:

- Improved Financial Management
  Strategic tax planning as well as oversight of your family's entire financial picture.
- Collaboration with Outside Advisors
  By working with your family's other professional advisors, we are able to tailor customized solutions and provide complete alignment of your current and long-term family wealth objectives.
- Valuable Guidance by Experienced Professionals
  Our forward thinking approach ensures that our tax and financial recommendations are always timely and innovative.

Tax Planning and Return Preparation

Advanced tax planning strategies • Transactional planning for closely held businesses • Representation before tax authorities • Business formation & entity selection • Individual, corporate, partnership, fiduciary, gift, estate and foundation tax return preparation

Estate, Wealth Transfer and Charitable Planning

Tax efficient wealth transfer planning • Host family meetings • Asset protection planning • Philanthropic planning

Personal Financial Management and Reporting

Customized personal financial reporting • Bill payment and expense management • Domestic employee reporting • Cash flow planning and projections • Budgeting and debt management • Electronic document management and record retention • Organization of tax documents

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2500 Dallas Parkway, Suite 300
Plano, Texas 75093

Fort Worth Office
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Fort Worth, Texas 76102

Austin Office
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(972) 748-0300
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OUR VALUES

MCG was founded on five core values:

Relationships. Value. Excellence. Integrity. Purpose.

Every day, we strive to live up to these values by focusing on our relationships with our clients, ensuring that everything we do has value, conducting all our business with the highest quality, doing the right thing every time and fulfilling our purpose.

OUR MISSION

MCG is a purpose-driven firm.

Our mission is to ***be significant in the lives of others*** by building strong, lasting relationships, providing a variety of high quality services, and going out of our way to solve even the most complex problems.

Tracey S. Spivey

Tracey joined the Firm as a Partner in January 2013. He has over 20 years of experience advising and serving high net worth families in the areas of wealth transfer planning, strategic income tax planning, asset protection planning, and tax return compliance. Tracey is very knowledgeable on the unique issues facing high net worth families in today's dynamic global financial environment. His expertise in individual income, fiduciary income, estate, gift, and generation-skipping transfer taxes allows him to develop specialized solutions and strategies for his clients that meet both short and long term goals and objectives.

Bennett Richardson

Bennett is a Tax Director that joined the Firm in January 2014. He has significant experience working with business owners and high net worth families in the development and implementation of wealth transfer, income tax and business succession planning. Bennett's expertise in estate, gift, fiduciary income and individual income taxes enables him to effectively develop strategies to meet his clients' goals and objectives.

Jeanette A. Musacchio

As a founding partner of the Firm, Jeanette has over twenty years experience in helping entrepreneurs throughout the lifecycle of their business from start-up to exit events. Her expertise includes identifying and implementing streamlined accounting policies and procedures and advising on overall financial organization set-up for accurate and timely reporting. Her main goal is simplification, clarity and control of your financial life, both personal and business.

Lisa Moss

Lisa's service model as a concierge financial partner allows her to focus on her clients' personal financial management including such tasks as weekly cash management, private mail box pickup, bill pay, coordination of information flow between family members and other advisors, or monitoring insurance and other benefit account renewals. Lisa strives to make her clients' lives easier by reducing the administrative burden of maintaining their lifestyle and investments.

Scott Erwin

Scott's hands-on management approach has proven success in developing and maintaining the reporting and analysis functions for his clients' personal and business financials. His unique background as a tax professional for high net worth individuals, CFO for private companies, and trusted advisor for business owners' personal financials allows him to understand all aspects of his clients' financial lives.