GOALS-BASED PLANNING

THE OTHER
FAMILY OFFICE

Differentiating strategies to achieve your ***unique*** objectives.

TRUE FIDUCIARY ADVICE

Embrace the legal fiduciary obligation to place your interests first and target total financial well being:

- 100% independent firm
- Fee-only advice with complete Transparency on fees paid

INDIVIDUALIZED PLANNING

Dedicated in-house professionals focused on your goals:

- Advisors fused with Private Wealth Services
- In-person or virtual planning

Customized approach to manage your goals and objective:

- Process driven
- Tax-efficient strategies
- Search, due diligence, fee negotiation and advocacy on purchases
- Personal CFO integrates financial plans
- Ongoing reviews and strategies at no additional cost
- Liaison to 3rd party advisors your already have in place
- Custom tax-loss harvesting strategies, offsetting taxes on gains and income

CUSTOMIZED MANAGEMENT PLAN

Custom, purpose-driven, plan:

- Lifetime Capital Needs, Wealth Surplus, and Aspirational Wealth

Highly-customized and clearly defined objectives:

- Risk assessment
- Lifestyle plans
- Cash flow, tax, and liquidity strategies

INNOVATIVE INVESTMENTS

Access to:

- Private investments (business acquisition)
- Bridge loans and mezzanine debt
- Customized structured notes
- Separately managed accounts