

ADVANCED PLANNING SOLUTIONS FOR WEALTHY FAMILIES

Comprehensive wealth management and financial planning strategies that help successful families grow and protect their wealth for generations.

Investments

- Diversified private investment portfolio
- Alternative asset classes
- Custom tax-optimized portfolios
- Strategic management of concentrated securities
- Socially responsible portfolios
- Institutional investment research in partnership with a nationally recognized investment consultant

Business Owner Services

- Business succession planning resources
- Advanced retirement plan design
- Exit planning strategy and collaboration with external partners

Strategic Partner Services

- Banking and lending at preferred rates
- Trustee services
- Family governance
- Bill pay

Financial Planning

- Estate Planning Specialist
- Advanced tax planning support
- Legacy planning, including philanthropy and family wealth transfer
- Heritage Generations Group to provide investment and financial planning advice to immediate family members

Reporting and Communication

- Quarterly meetings
- Annual Wealth Management Summary detailing goals, recommendations, accomplishments, along with estate and tax planning documents
- Comprehensive Net Worth Statement
- Dedicated client service team

