Developing Your Wealth Management Strategy
Portfolio Risk Analysis
Cash Flow Analysis
Financial Planning
Asset Management
Hedging Strategies
Fixed Income Products
Family Governance
Alternative Investments
Estate Planning Strategies
Comprehensive Portfolio Evaluation
Intergenerational and Legacy Planning
Private Banking
Charitable Remainder Trust
Tailored Lending
Dynasty Trust

1

Discovery Process

Identify your goals, values, dreams, special concerns/challenges

2

Develop Investment Strategy

Determine risk tolerance, analyze current investment portfolio, develop asset allocation strategy

3

Execution of Investment Strategy

Open new accounts, transfer existing assets, implement investment strategy

4

Create Family Mission Statement

Understanding family dynamics and creating family governing documents

5

Continuous Investment Analysis

Using various tools and applications to evaluate Short- and long term positions

6

Formalize Advisory Network

Recommend/collaborate with Trust and Estate Planning Attorneys,
CPA, Insurance and Risk Management Professionals

7

Intergenerational Development And Estate Planning

Formal discussions regarding Effective asset transfer and tax minimization

8

Track Investment Strategy Based on changes to goals And expectations

Adjust investment portfolio and/or
Wealth management plan when suitable