Integrated
FAMILY OFFICE

We work with clients of significant wealth to centralize the management of your financial, business and household affairs bringing simplicity to complexity.

Collaborating with Families

Our mission is to protect and foster family wealth throughout future generations. From prioritizing goals using a cross disciplinary approach to deliberate conversations surrounding your family's ambitions, we deliver value by providing a dedicated staff to manage all areas of your wealth. This dynamic relationship means we can implement efficient, impactful strategies quickly based on family decisions, political tensions or tax changes.

Consistency

Based on a foundation of trust and communication, we help you build and expand your legacy for generations to come.

Coordination

Our experienced team of specialists collaborate and act as a catalyst to ensure your wealth management plan reflects your family mission now and into future generations.

Customization

We implement tailored strategies that adapt to your evolving needs, bringing your family's mission to life.

Collaborating with Business Owners

We provide a comprehensive platform for business owners to access the necessary expertise for their complex planning, consulting and exit transaction needs. Our coordinated approach to exit planning quantifies the financial impact of various exit options for the family and the business. As your advocate, we align the business decisions being made today with your family's wealth management goals.

Family Office Services

Wealth Management

Our client portal and designated single point of contact brings a truly integrated solution combining technology and live, personal care.

- Financial and Investment Management
- Tax Planning and Coordination
- Consolidated Performance Reporting
- Performance Measurement
- Risk Monitoring and Impact Planning
- Portfolio Manager Selection

Lifestyle Management

Travel coordination... fraudulent credit card charges... managing household staff... our team handles these time-consuming tasks for you.

- Bill Pay
- Accounting Services
- Household HR Services
- Document Management
- Family Buying Power
- IT Services

Philanthropy

Increase your giving and make a bigger impact by integrating your charitable endeavors into your overall financial plan.

- Charitable Planning Strategies
- Donor Advised Funds
- Family Foundation Management

Legacy Planning

Have confidence that your interests will be maintained, your family will be cared for and appropriate decisions will be made on your behalf.

- Estate Planning
- Wealth Distribution Strategies
- Risk Management
- Asset Protection

Business Planning

Put a plan in place for the growth and succession of your business, source and evaluate your exit options, and coordinate any tax planning matters.

- Consulting
- Succession Planning

Private Banking and Lending

Leverage competitive rates and banking solutions to create new opportunities for your family.

- Lending Solutions
- Liquidity Strategies
- Personal Banking Needs

Trust Company Services

Learn the value of having an independent trustee to implement and oversee your trusts.

- Access to Trust Companies
- Tax Efficient Jurisdictions
- Asset Protection

Governance

Act as an advocate to strengthen the family's vision through communication, education and relationship building.

- Annual Family Meetings
- Family Mission Statement
- Generation Financial Education