Service Platform

Tiered Services That Excel Our Clients Success

Private Client | $1,000,000 in Investable Assets

- Quarterly Review Meetings with your advisor, either in-office, video conference or by phone.
- Priority Access Meetings with your advisor upon request.
- Wealth Enhancement and Wealth Protection Planning
- Tax-Free and Tax-optimized Investment Planning Philanthropic and Charitable Giving Planning Banking, Structured-Lending, and Income Solutions (Provided by AssetMark Trust)
- Legacy and Endowment Guidance Concentrated Stock Investment Planning
- Risk Management Review
- Family-Succession Planning
- Next-Gen Investment Program
- Family-Tiered Billing and Reduced Fee Structure Private Equity, Venture Capital and Hedge Fund

Service Level Includes:

+ All Core Investment Management and Wealth Management Services along with Additional Services