Service Platform

Tiered Services That Excel Our Clients' Success

Private Client | $2,000,000 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
- Advanced Planning Review:
- Family Wealth Transfer, Wealth Enhancement and Wealth Protection
- Estate Planning
- Tax-free and tax-optimized investments, philanthropic advisory and charitable giving, banking and structured-lending
- Legacy and endowment guidance
- Concentrated stock planning
- Risk management review
- Next-gen investment program
- Family-tiered billing and reduced fee structure private equity, venture capital and hedge fund reviews

Service Level Includes: + All core investment management and wealth management services along with additional services and Advanced Plan Review