Wealth Management Formula

WM = IC + AP + RM

WM (Wealth Management) =

IC
(Investment Consulting)
+
AP
(Advanced Planning)
+
RM
(Relationship Management)

AP = WE + WT +WP + CG

AP (Advanced Planning) =

WE
(Wealth Enhancement: tax mitigation and cash-flow planning)
+
WT
(Wealth Transfer: transferring wealth effectively; may not be within a family)
+
WP
(Wealth Protection: risk mitigation, legal structures and transferring risk to insurance company)
+
CG
(Charitable Giving: maximizing charitable impact)

IC = INVESTMENT CONSULTING

Management of all investment elements to maximize the probability of clients achieving all that is important to them.

- Portfolio performance analysis
- Risk evaluation
- Asset allocation
- Assessment of impact of costs
- Assessment of impact of taxes
- Investment policy statement

RM = CRM + PNRM

RM (Relationship Management) =

CRM
(Client Relationship Management)
+
PNRM
(Professional Network Relationship Management)