



Ultra High Net Worth Families

- Wealth preservation strategies
- Succession planning strategies
- Family governance and rising generation education
- Family office structuring and design
- Legacy planning
- Philanthropy



Founders and Entrepreneurs

- Pre- and post-sale liquidity strategies
- Financing opportunities
- Business succession planning
- Business community networking
- Investment Banking advice
- Estate and tax planning considerations



Corporate, Hedge Fund and Private Equity Executives

- Equity awards management
- Liquidity management
- Risk management
- Life transitions
- Tailored lending