COPPER CREST CAPITAL

Private Wealth Management

for all your Investment, Retirement, Estate and Tax Planning needs

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LET OUR TEAM OF PRIVATE WEALTH ADVISORS HANDLE ALL OF YOUR WEALTH MANAGEMENT NEEDS

COPPER CREST CAPITAL

INVESTMENT MANAGEMENT

Tailoring investment portfolios using globally diversified, low-cost and tax-efficient strategies encompassing a client's entire portfolio of assets.

RETIREMENT/ESTATE PLANNING

Setting achievable retirement income generation and asset preservation goals through tax-efficient wealth transfers and charitable planning.

TRUST & ESTATE ADMINISTRATION

Fulfilling administrative and accounting duties for trusts and estates including cash flow planning and asset preservation.

STRATEGIC PARTNERS

Facilitating legal, insurance and other financial services consistent with each client's wealth management plan.

TAX PLANNING & PREPARATION

Minimizing the impact of taxes using customized tax planning strategies while preparing all personal, business and fiduciary tax returns.

THE BENEFITS OF A MULTI-FAMILY OFFICE

OUR CENTRALIZED APPROACH TO WEALTH MANAGEMENT

Managing conflicting advice from separate financial advisors, estate planners, and accountants can be daunting.

We provide a centralized approach by developing one comprehensive strategy tailored for each client.

COMPREHENSIVE APPROACH TO ASSET ALLOCATION

We develop a well-diversified asset allocation strategy that reflects each client's entire estate including investment portfolios, business interests, real estate holdings and personal assets.

MINIMIZING TAX IMPACTS

Taxes are often the largest financial burden to preserving wealth. Using our centralized wealth management approach, we develop and incorporate tax-efficient strategies into each client's wealth management plan.

OUR WEALTH MANAGEMENT TEAM

OUR EXPERIENCED TEAM DEDICATES THE TIME TO UNDERSTAND EACH CLEINT'S UNIQUE SITUATION BEFORE DEVELOPING A COMPREHENSIVE WEALTH MANGAGEMENT PLAN

MICHAEL STEPHENSON

Private Wealth Manager

MASON TUCKER

Private Wealth Manager

DAVID FOSTER

Portfolio Manager &
Investment Strategist

JEFF STEPHENSON

Portfolio Manager &
Estate Strategist

OUR PROCESS ENSURES EACH CLIENT'S FINANCIAL AND PERSONAL GOALS ARE ADDRESSED

STEP 1 - ENGAGEMENT

We dedicate the necessary time to understand each client's unique needs.

STEP 2 - PLANNING

We develop a comprehensive plan to include a client's entire portfolio of assets.

STEP 5 - REVIEW

We conduct periodic reviews with our clients to ensure each plan evolves with ever-changing needs.

STEP 3 - IMPLEMENTATION

We implement a customized asset allocation strategy to address each client's financial and personal goals.

STEP 4 – MANAGEMENT

We manage each aspect of our client's financial plan to ensure a consistent strategic approach.


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