Wealth Management Formula

WM = IC + AP + RM

WM (Wealth Management) =

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

IC = INVESTMENT CONSULTING

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

AP = WE + WT +WP + CG

AP (Advanced Planning) =

WE (Wealth Enhancement: tax mitigation and cash-flow planning)
+
WT (Wealth Transfer: transferring wealth effectively)
+
WP (Wealth Protection: risk mitigation, legal structures and insurance)
+
CG (Charitable Giving: maximizing charitable impact)

RM = CRM + PNRM

RM (Relationship Management) =

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