Professional Services Firms

Tailored Services Achieve Your Long-Term Goals

Private Investment Counseling Services for Professional Services Firms

As founder of Reynolds Group, Private Investment Counselors, I take pride in providing a comprehensive range of highly tailored services to meet your firm's unique needs, values and long-term financial goals. Working in concert with your suite of professional advisers, or as your Private Investment Counselor, I provide the following services to professional services enterprises:

Fiduciary Services
- Review and advise on investment planning.
- Serve as fiduciary or investment committee member, upon request.

Investment Strategy*
- Establish long-term financial goals.
- Quantifiable concrete investment objectives.
- Comment on recommendations for diversifying concentrated holdings, if any.
- Determine asset allocation strategy.
- Review major global/regional allocations.
- Participate in periodically rebalancing assets.
- Assist in the selection of asset managers.
- Review and advise on investment performance, based on established goals and objectives.

Distribution Strategy*
- Harmonize the investment strategy with distribution policies.

Governance
- Develop efficient and effective governance practices.
- Assist with decision-making for investment management.
- Participate in the selection professional service providers relevant to the investment assets.
- Advise on the appropriate form of asset ownership.
- Set up asset aggregation vehicles for multiple pools of assets, if appropriate.

Adviser Management
- Establish evaluation, review and appraisal procedures for advisers:
  - Fiduciaries – Accountants and auditors – Legal counsel
  - Investment strategy consultant – Internal functions – Custodian
  - Performance monitoring service
- Meet and consult with advisers and third-party vendors, as appropriate.

Firm Investment Planning
- Counsel on involving management members in the investment management process.
- Identify and assess individual financial goals and investment objectives in the context of firm's and its senior members' long-term wealth strategy.
- Determine the personal wealth counseling needs.

** These activities are conducted in concert with the overall wealth management advisory team.*

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