Individuals & Family Offices

Personalized Services Achieve Your Long-Term Goals

Private Investment Counseling Services for Individuals & Family Offices

As founder of Reynolds Group, Private Investment Counselors, I take pride in providing a comprehensive range of highly personalized services to meet your unique needs, values and long-term financial goals. Working in concert with your wealth management advisory team, as your Private Investment Counselor, I provide the following services to high net worth individuals and families:

Fiduciary Services
- Review and advise on financial and estate planning.
- Serve as trustee, executor, LLC co-manager, or protector, upon request.

Investment Strategy*
- Establish long-term financial goals.
- Create concrete, quantifiable investment objectives.
- Comment on recommendations for diversifying concentrated holdings, if any.
- Determine asset allocation strategy.
- Structure global geographic/regional exposure targets.
- Periodically rebalance assets.
- Participate in the selection of asset managers.
- Review and advise on investment performance reporting, based on goals and objectives.

Spending Strategy*
- Determine spending policies.
- Oversee discretionary distributions.

Governance
- Develop efficient and effective governance practices.
- Assist with decision-making for wealth and investment management.
- Participate in the selection of estate, financial planning and other advisers.
- Determine the suitability of engaging a protector.
- Advise on the appropriate form of asset ownership (e.g., trust, partnership, LLC, etc.).
- Set up asset aggregation vehicles for multiple pools of assets, if appropriate.
- Counsel on non-investment wealth management needs (e.g., philanthropy, personal-use real estate management, concierge services, etc.).

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

Family Financial Planning
- Counsel on involving family members in the wealth and investment management process.
- Identify and assess individual financial goals and investment objectives in the context of your long-term wealth strategy.
- Determine the personal wealth counseling needs of younger generations.

Management of Non-Investment Assets
- Counsel principals regarding:
  - Personal use real estate – Art and collectables – Yacht(s) – Aircraft – Auto and other

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

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