

We Define Wealth by a Family's Level of Well-Being:

their state of being happy, healthy, and prosperous, now and for generations to come.



- We believe that a family's most valuable assets are its individual members.
- And that a family's financial assets are best utilized in optimizing their development
- We favor directed trust structures that provide for best-in-class selection of functionaries.
- We do not manage money. We collaborate with your existing financial advisors or delegate to one of our vetted resources.
- We never "share fees" if we make a referral.
- Our fees are determined by the scope of work and based on each family's circumstances.

TRUSTEE

We serve as stand-alone or co-trustees with others.

- Trust protectors
- Special Trust Advisors

ADMINISTRATION

We delegate the administrative function to proven professional trust companies.

DISTRIBUTION

We elevate the importance of this function by investing time into building substantive relationships with individual beneficiaries. This familiarity allows us to make more life-enhancing distributions and fewer harmful ones.

Value Shield

Call us today for a well-being review!

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