



IC
Investment Consulting

AP
Advanced Planning

RM
Relationship Management

The Equation

- IC = Investment Consulting
- AP = Advanced Planning
- RM = Relationship Management

IC = Investment Consulting

- Historical Portfolio Performance Analysis
- Risk Evaluation
- Asset Allocation
- Investment policy Statement building and review.
- Investment management & rebalancing
- Portfolio Protection
- Investment and banking platforms
- Asset administration and servicing
- Consolidated reporting & monitoring
- Compliance and Risk administration

WE + WT + WP + CG

- **Wealth Enhancement**
 - Tax & cash flow planning
- **Wealth Transfer**
 - Transferring wealth effectively
- **Wealth Protection**
 - Risk mitigation, legal structures and transferring of risk
- **Charitable Giving**
 - Philanthropy & foundations

CRM + ENRM

- Client Relationship Management
- Expert Network Relationship Management