FIDUCIENT Advisors

FIDUCIENT WEALTH OFFICE

Integrated Wealth Management

Clarity. Confidence. Collaboration.

Significant wealth can create significant opportunities – and significant challenges. Fiducient Advisors extends a wide range of wealth consulting services to affluent individuals and families, family offices, corporate executives and business owners.

The Wealth Office® of Fiducient Advisors works with *you* to protect your assets from the ravages of excessive taxation, inflation and unwarranted investment risk – with the goal for your wealth to be accumulated, preserved and ultimately transferred to future generations or philanthropic endeavors. We understand that your family is unique in your desires and goals and therefore we seek to find tailored investment and wealth management solutions for you – rather than employ a 'one-size-fits-all' approach.

Drawing upon our broad access to professional resources, investment research and analytical tools, we pay special attention to important issues including estate, retirement and tax planning, which can affect your investment strategy. Our team can help build or work with your existing team of professionals, enabling and ensuring efficient communication, implementation and cohesiveness across family wealth – all in a discreet and confidential manner.

Wealth Management

- Retirement/Income Planning
- Insurance/Risk Management Planning
- Income Tax Planning
- College Savings Planning
- Employee Benefits Planning

Investment Management

- Tax-Efficient Strategies
- Active & Passive Strategies
- Public Markets
- Private Markets
- Concentrated Stock Strategies
- Legacy Investments

PLAN

Legacy

- Philanthropic Strategies
- Wealth Transfer/Estate Planning Strategies
- Next Generation Education
- Family Mission/Values Planning
- ESG/SRI & Impact
- Business Succession Planning

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What Makes Fiducient Advisors Different?

When choosing an advisory firm to manage your wealth, it is important to know that the organization you select will always act in your best interest. The Wealth Office® embraces our fiduciary role, operating under the highest standard of obligation to our clients. We see our business through our client's eyes, offering advice to help meet a wide range of important wealth goals.

Where You Invest Makes a Difference

The distinction between our fiduciary model and others can directly impact recommended investments, your expenses, how your portfolio is constructed, and ultimately your wealth. We believe functioning as fiduciaries is an approach that is the most beneficial to your long-term success.

To understand how our approach sets us apart, consider how we serve clients:

- **Size & Knowledge**: 26+ years of servicing families and family offices.
- **Investment Research**: We provide clients thoughtful, practical and actionable traditional and alternative investment strategies – with an eye on cost and tax efficiency.
- **Aligned Interests**: We strive to avoid the potential conflicts of interest embedded in competitors affiliated with investment banking or proprietary trading to provide wealth solutions that are appropriate for you, not simply convenient or profitable for the firm.
- **Investment Access**: We can help clients obtain access to private equity, hedge funds and other limited access investments.
- **Experienced Team**: Many of our talented and caring team members hold credentials and are cultivated from accounting, legal and investment backgrounds.
- **An Extension of Your Family**: We collaborate and advocate with your team of legal, tax, insurance and other trusted professionals to help drive outcomes that benefit you and your family.

Contact us today to learn more about how we can become your trusted wealth advisory partner.

For information please contact:
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