



PEAKVIEW ADVISORS, LLC

PEAKVIEW ADVISORS IS A FULL-SERVICE FAMILY OFFICE. TOGETHER WITH ITS SISTER COMPANY VELARA, PEAKVIEW HAS BEEN WORKING WITH TWO FAMILIES FOR THE PAST SEVEN YEARS. THIS SHEET GIVES AN OVERVIEW OF THE SERVICES WE PROVIDE. WITH OUR EXPERTISE AND EXPERIENCE IN ACCOUNTING, LAW AND INVESTMENT MANAGEMENT, PEAKVIEW IS WELL EQUIPPED TO HANDLE THE MOST COMPLEX OF FAMILY OFFICE NEEDS. AS A FULL-SERVICE FAMILY OFFICE, WE PROVIDE THE FOLLOWING SERVICES:

INVESTMENTS – DEVELOP ASSET ALLOCATION MODELS; EVALUATE PERFORMANCE; MONITOR PORTFOLIOS AND MANAGERS; HIRE AND FIRE MANAGERS; NEGOTIATE FEES, CONSOLIDATE AND CUSTOMIZE REPORTING

BANKING – NEGOTIATE AND MANAGE FEES, EVALUATE LENDING ARRANGEMENTS, MAINTAIN APPROPRIATE LIQUIDITY, MANAGE AND RECONCILE ALL ACCOUNTS

ESTATE / WEALTH TRANSFER / ASSET PROTECTION PLANNING – FORMULATE AND EXECUTE ESTATE AND WEALTH TRANSFER PLANS; ANALYZE TAX IMPLICATIONS; ADVISE FAMILY MEMBERS ON BUSINESS SUCCESSION AND PHILANTHROPY

TAXES AND ACCOUNTING – CREATE AND MAINTAIN FINANCIAL STATEMENTS, COMPILE RECORDS AND PREPARE INFORMATION REQUIRED FOR TAX RETURNS; REVIEW AND APPROVE TAX RETURNS; STRUCTURE WEALTH TO MINIMIZE AND/OR AVOID INCOME, GIFT AND ESTATE TAXES

INSURANCE – DETERMINE NEEDS (PERSONAL, HEALTH, LIFE, COMMERCIAL, ETC) AND NEGOTIATE PRICING; PROCESS CLAIMS

EMPLOYMENT – OVERSEE PERSONNEL POLICIES; SUPERVISE ALL FAMILY EMPLOYEES, INCLUDING PAYROLL AND BENEFITS; MANAGE HIRING AND TERMINATIONS

FINANCIAL PLANNING – EDUCATE FAMILY MEMBERS ON SPENDING; DEVELOP BUDGETS; ANALYZE AND MONITOR CASH FLOW, DEVELOP CUSTOMIZED REPORTING

REAL ESTATE – MANAGE UPKEEP, DETERMINE FINANCING, NEGOTIATE ACQUISITIONS AND SALES

BUSINESS – MAINTAIN RELATIONSHIPS WITH OUTSIDE PROVIDERS (ATTORNEYS, CPA'S, ASSET MANAGERS, ETC)

PERSONAL – PAY BILLS; ASSIST WITH ANY SPECIAL PROJECTS; MAINTAIN TECHNOLOGY

CHARITABLE GIVING – DEVELOP PHILANTHROPIC STRATEGIES; MANAGE OPERATION OF FOUNDATIONS, INCLUDING GRANT-MAKING AND GOVERNANCE; MONITOR INVESTMENTS; RESEARCH PROJECTS

AVIATION – ASSIST WITH ACQUISITIONS, DISPOSITIONS, STRUCTURING AND MANAGEMENT; MANAGE CHARTERS AND UPKEEP

OTHER – THIS IS ONE OF THE MOST IMPORTANT SERVICES WE PROVIDE. WE ASSIST WITH THOSE EVERYDAY AND ONCE-IN-A-LIFETIME CHORES IN A PROFESSIONAL AND COMPETENT WAY. WHETHER IT BE GATHERING INFORMATION FOR COLLEGE APPLICATIONS OR FIGURING OUT HOW TO GET A HORSE TO FRANCE, WE WILL BE THERE TO HELP.

**PEAKVIEW ADVISORS, LLC • 1200 17TH STREET, SUITE 610
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REFERENCES & BIOS AVAILABLE UPON REQUEST