Cherry Bekaert Wealth Management

Services for Ultra-High-Net Worth Families

Ultra high-net-worth families face growing complexity in managing, protecting and growing family wealth. The challenges and increased responsibilities, for families who have various advisors and complex interests, multiplies as greater control and oversight is necessary to handle your financial and fiduciary affairs. We can provide support to families who have existing family offices or require other outsourced services.

The average ultra high-net-worth family has multiple investment advisors, who themselves manage assets across multiple accounts, strategies and asset classes. Typically, individual advisors do not have a comprehensive view of clients' asset allocation, performance, risk exposure and overall strategy. Without a comprehensive and unbiased view, it's difficult to make informed and strategic investment decisions in order to preserve capital, grow and maintain control over the family wealth.

Having a 360-degree wealth perspective that includes your total financial situation enables you to understand the interplay of risks and returns across the entire portfolio, spanning diverse assets classes, multiple money managers, as well as, liquid and illiquid assets. It can also provide for a better investment experience which balances the global household level asset allocation with goal-specific or account-specific tactical allocations and tax efficiency.

Cherry Bekaert Wealth Management, LLC is a wholly owned subsidiary of Cherry Bekaert, LLP, an accounting firm with over 70 years of advising clients. We provide independent advice to address your unique needs, as well as, understand the importance of alignment of interest between the advisors and the family , as well as, the need to integrate that advice, as an independent third party.

At Cherry Bekaert Wealth Management we can help you navigate the complex maze of diverse holdings and advice from an array of professionals. Our team of experienced and objective wealth management professionals can provide the framework for a disciplined approach to protect and grow your wealth.

Our comprehensive suite of independent consulting services are tailored to meet your unique requirements and include:

Investment Advisory Oversight Services*

Advisory Services

- Investment Policy Analysis
- Asset Allocation and Strategy Reviews
- Allocation and Rebalancing Oversight
- Performance Benchmarking
- Investment Manager Due Diligence and Evaluation
- Risk Management
  - Risk Modeling
  - Scenario Portfolio Planning

Consolidated Financial Strategies

- Investment Aggregation
- Performance Reporting
- Fixed Income Analysis
- Fee Analysis
- Coordination of Team of Advisors
- Monitoring private equity, alternative investments and commitments

Client Reporting

- Client Portal
- Account & Consolidated Reporting
- Investment Performance
- Account & Consolidated P&L
- Consolidated Net Worth
  - Private Business Entities
  - Hedge Funds
  - Real Estate
  - Personal Property
- Portfolio Allocation
- Cash Flow Projections

** Refer to Cherry Bekaert's Wealth Management, LLC ADV Part 2A brochure.*

At Cherry Bekaert Wealth Management we specialize in guiding clients move forward. Let us assist you in managing your financial life with objectivity and attentiveness.

Your guide forward

Cherry Bekaert
Wealth Management LLC

cbhwealth.com