EDGEMONT ADVISORS, LLC
FAMILY WEALTH MANAGEMENT

Edgemont's mission is to provide exemplary family office services to select clients. With uncompromising dedication, ethical standards, professionalism and respect, we will help our clients build and manage their wealth for current and future generations.

Services

Edgemont acts as the client's Chief Financial Officer providing objective personalized family office services. We utilize a relationship-intensive approach to develop customized and comprehensive investment, tax, and estate plans. Edgemont implements the agreed-upon investment, risk management, and estate planning strategies in fulfillment of a comprehensive overall plan. We provide absolute assurance of privacy and confidentiality.

Methodology

Edgemont will perform a comprehensive review of all legal and other relevant documentation regarding family entities, trusts, family partnerships and wills to obtain a thorough understanding of our client's overall objectives, financial assets and liabilities, investment goals and risk profile, and family circumstances and dynamics.

Edgemont works with our client as a team, collaborating on the design and development of the coordinated investment and estate planning strategies to be implemented. Our clients have total control over all investment and estate planning decisions. Our responsibility is to implement and monitor the agreed-upon strategies on behalf of the client.

Edgemont utilizes the services of our client's existing professionals, such as accountants and attorneys, to the extent possible. If necessary, at the direction of and with the full participation of the client, we will identify, retain, utilize, and collaborate with external attorneys and tax specialists to solve complex issues encountered by the client. We coordinate the identification, selection, and utilization of product and service providers.

Edgemont has no discretion over our client's accounts. Investment decisions are the responsibility of investment managers, selected based upon our client's investment objectives and risk profile. While we monitor the activities of the selected investment managers on behalf of our client, we have no access to any funds in these accounts.

Independence

Edgemont has no conflicts of interest and, therefore, can provide completely objective advice. We do not accept any form of compensation or commission, either directly or indirectly, from any firm or individual providing products or services to our clients. Our only business is to provide family office services and our only compensation is the advisory fees paid to us by our clients.

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