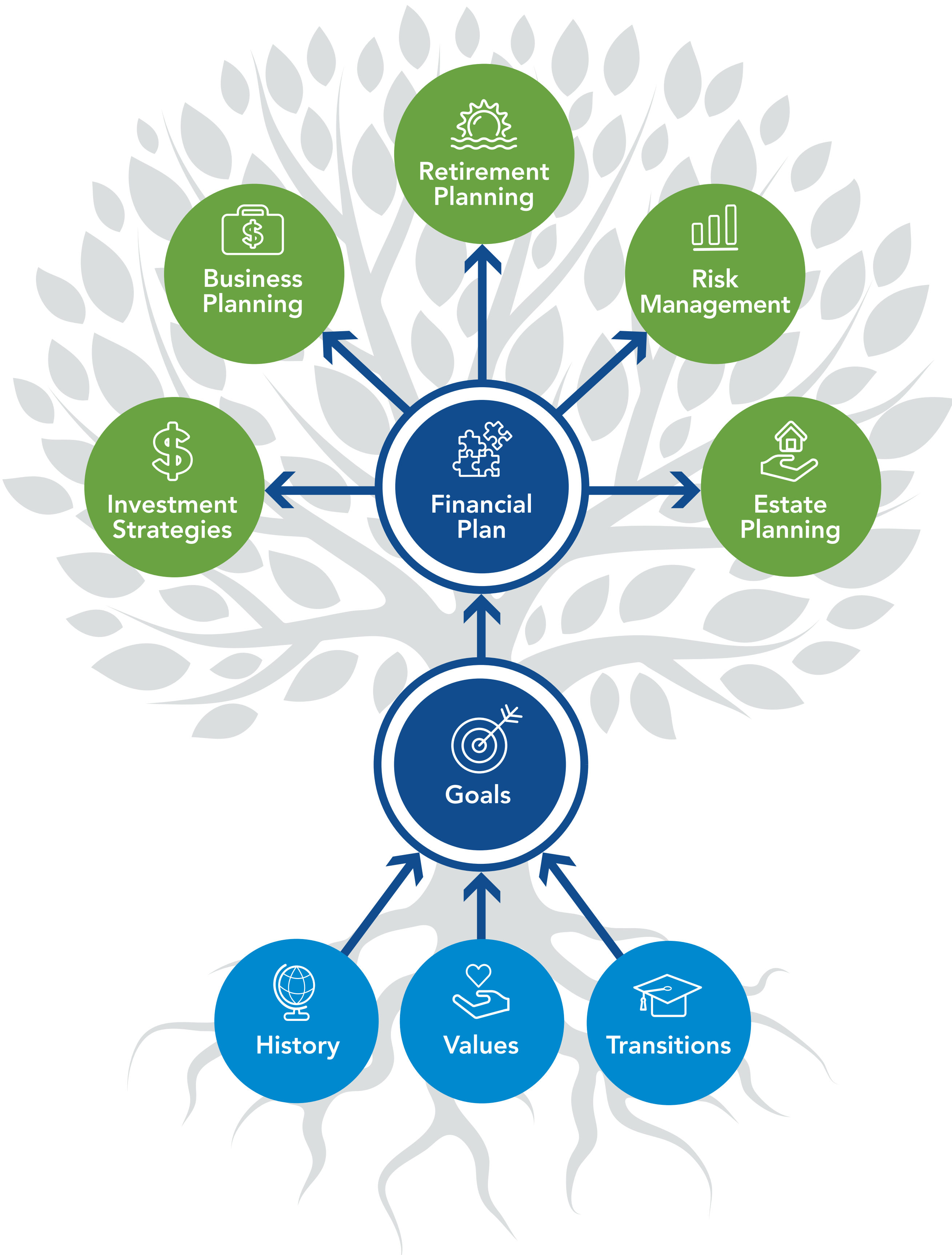
childs company

Private Wealth Management

Our Approach:

Deeply Rooted in Your Success



childs company

Private Wealth Management

Deeply Rooted Financial Planning

At Childs Company we believe a sound financial plan begins with understanding your roots (history, values and transitions). We seek to engage deeply with each client to understand all aspects of their life to develop a strategy to achieve personal and financial goals. Our systematic approach helps execute each unique strategy.

History

Understanding your background as well as your personal, business and financial experiences allows us to facilitate comprehensive financial planning for you and your family.

Values

Your passions and purpose and how you want to promote them should blend into a cohesive financial plan.

Transitions

Life has many different stages with distinctive challenges. Examples include having children, saving for college, planning for retirement, elder care, etc. We will consult with and advise you through these transitions.

Goals

Unique to every individual and family - we help clients develop and implement plans which integrate personal, business, and career goals.

Retirement Planning

How much will be enough to retire? Our cash flow model provides insight into income, distributions and asset growth up to and through retirement.

Business Planning

We use our experience and contacts to consult on growth strategies, succession planning and exit strategies for business owners. We also work with our clients and their accountants to take advantage of tax planning and savings opportunities.

Investment Strategies

Our investment recommendations will take into consideration your total balance sheet, including real estate, business interests, private equity investments and qualified plan accounts (401k plans, etc.).

Risk Management

Developing strategies for life, disability and long term care insurance are an important piece of the financial plan. We analyze what you should need and work with a trusted specialist to provide solutions to our clients.

Estate Planning

We partner with clients and attorneys to set goals for estate planning through discussion of wills, charitable giving and creation of trusts when appropriate.