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Titolo	Advising the ultra-wealthy : a guide for practitioners // Gregory Curtis
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Descrizione fisica	1 online resource (XVI, 128 p.)
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Nota di bibliografia	Includes bibliographical references and index.
Nota di contenuto	Chapter 1: Ultra-Wealthy Families and Their Financial Advisors -- Chapter 2: How Families Get Rich (and Why It Matters to You) -- Chapter 3: Differences Between Wealthy Families and Institutions -- Chapter 4: Building an Ultra-Wealthy Family Client Base -- Chapter 5: A Wealthy Family's Many Advisors -- Chapter 6: Policy Statements for Wealthy Families -- Chapter 7: Evaluating Money Managers for Family Portfolios -- Chapter 8: On Governance: Decision-making in Families -- Chapter 9: Family Philanthropy -- Chapter 10: They're Selling the Family Company: Now What? -- Chapter 11: What Is the Wealth For? -- Chapter 12: Socially Responsible Investing -- Chapter 13: Trusts and Estate Planning -- Chapter 14: Strengthening Your Existing Knowledge -- Chapter 15: Miscellaneous Issues that Affect the Ultra-Wealthy.
Sommario/riassunto	This book, designed to be a guide for practitioners who wish to advise ultra-wealthy families, focuses on the difference between the ultra- wealthy and the 'merely' wealthy. With this in mind, the chapters devote little time to issues on which most financial advisors spend most of their time—retirement planning, IRA accounts, home mortgages, planning for college tuition, or financial planning in general. Practitioners working with the ultra-wealthy will instead need to grapple with complex tax issues, matters associated with the ever- changing world of trusts, the special world of the family office, money managers that are not available to anyone who is not an accredited

investor or who enforce very high minimum account sizes, the family dynamics and human capital issues that destroy both families and wealth, and so on, all of which will be covered on a global scale in this book.
