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Edizione	[1st ed.]
Descrizione fisica	1 online resource (415 p.)
Collana	Wiley finance
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Soggetti	Rich people Investments - Decision making
Lingua di pubblicazione	Inglese
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Note generali	Description based upon print version of record.
Nota di bibliografia	Includes bibliographical references (p. 377-385) and index.
Nota di contenuto	Who are the ultra-affluent? -- Understanding the mindset of the ultra-affluent client -- Wealth attitudes, aspirations, and investor behavior of ultra-affluent clients -- Noninvestment best practices -- Practices of the best investment organizations -- Asset allocation considerations for ultra-affluent clients and family offices -- Domestic and international equity -- Domestic and international bonds -- Private equity -- Hedge funds -- Real assets -- Selecting an advisor -- Selecting a custodian and investment vehicle structure -- Considerations for creating a family office -- Wealth transfer planning -- Concentrated equity risk management -- Family governance -- Risk management and asset protection -- Philanthropy -- Multigenerational asset allocation strategies.
Sommario/riassunto	A timely guide for financial professionals looking to tap into the lucrative world of the ultra-affluent. The ultra affluent-defined here as those having 50 million or more in liquid assets-are an elite class who expect their financial advisors to not only preserve and grow their assets, but also help them with ""soft"" issues such as philanthropy and family governance. One of the biggest factors to success in this field is the relationship between the client and the advisor. In <i>Advising Ultra-</i>

Affluent Clients and Family Offices, author and practicing investment
consultant Mich
