Private Client Services

Just as building your wealth took time and many strategic decisions, preserving and maximizing the value you created requires a thoughtful and robust approach. You need advisors you can trust with this essential component of your current lifestyle and financial future – so that you can focus on the business or family office that drives it.

Grassi's Private Client Services professionals are skilled at addressing the unique aspects of your family, business, estate and overall financial plan. Readily accessible and highly knowledgeable, our Private Client Services advisors specialize in putting your goals and dreams at the center of every service and solution we provide.

Grassi's Private Client Services team has experience working with a wide variety of high-net-worth individuals, business owners, industries and tax structures, including Family Limited Partnerships, Family Offices, Real Estate Entities and Private Foundations.

Visit our website at
grassiadvisors.com/private-client-services

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Private Client Services

Our high-touch services include:

- **Tax planning and consulting** to identify and pursue all applicable tax mitigation strategies as tax law and your circumstances evolve
- **Trust & estate planning** to build maximum wealth for future generations while minimizing estate tax obligations
- **Gifting and philanthropy planning** to facilitate lifetime transfers to family members and fulfill your charitable initiatives in the most tax-efficient structure
- **Trust administration** to ensure complicated structures are properly administered to prevent the very tax and creditor issues they were set up to avoid
- **Family Office** bill pay, tax compliance, investment monitoring and other concierge services to keep your financial goals on track
- **Business valuations** to guide you through matrimonial issues, business transactions and other major events
- **Due diligence** services to help you make confident decisions when selling your business or transitioning it to the next generation
- **Business succession planning** to proactively develop your exit strategy and safeguard your business's future
- **Retirement planning** for a worry-free and rewarding new chapter of life

To learn more about how we can help you reach your current and future wealth preservation and tax savings goals, please contact:

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