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# Gresham Partners, LLC

## Managing wealth after the sale of a private business

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### Objectives

After the sale of a private publishing business valued at \$30,000,000, the wealth creator and members of his family are concerned about growing the purchasing power of their investments and avoiding the permanent loss of capital. The family would like to accomplish three primary goals:

1. To achieve successful investment results
2. To develop a gift and estate plan to transfer wealth over time to family and charities
3. To educate the second generation, ages 18-24, on family values and the responsibility of managing the family's wealth



### Solution

Work with the family to develop and agree on policies and success factors for each of these goals. We would design wealth transfer goals around a lifetime objective of preserving financial security for the first generation wealth creators and their children while opportunistically taking advantage of tax law changes and evolving family dynamics to transfer wealth to future generations and charitable organizations consistent with the family's values and distribution goals. Implement a multi-year family education program customized to provide the children knowledge and resources to make informed decisions about asset allocation, manager selection, tax and estate planning.

### Summary of Services Provided

- [Investment strategy and asset allocation](#)
- [Wealth transfer strategies for gifts and future estates](#)
- [Family education](#)

## GRESHAM