



## WEALTH ADVISORY

In an unsettled global environment, family offices are primarily looking towards preservation of wealth. Yet wealth preservation doesn't mean a completely defensive investment strategy.

Part of the reason for the focus on safeguarding wealth is many family having generated their wealth over decades, also want to ensure they can preserve the family's wealth into the future.

Interestingly, many families have also come into sudden wealth in recent years as they have received a high price when exiting their family business or have gained a sudden windfall from inheritance.

Additionally, as younger members of the family (Generation X and Y) become more involved in investment decisions, there has been an increasing interest in sustainable investing. The philosophy behind sustainable investment is families can invest more in line with their values and create positive generational change, while still generating profit. The aim being to create a positive family legacy while also supporting long-term wealth preservation.

Preserving and growing our clients' family wealth requires a delicate balancing act and getting investment strategies and allocations right requires putting together the right sort of team. A team of trusted advisers that understands the right weighting between growth, balance and preservation.

At RSM, we can assist with family wealth advisory in-house or provide a like-minded adviser externally with the right balance of skills and expertise. If we're not providing the services internally, we act as a single point of contact to manage the relationship and communication, ensuring your experience is seamless, co-ordinated in approach and trusted.

We understand wealth advisory services won't be needed by every client but it's an offering that reflects our approach to remain agile and to cater for every client's specific needs and requirements.

Like all of RSM's family office service offerings, wealth advisory can be retro-fitted for individual clients.

