

Liquidity planning required

Finnerty Partners

Private Wealth Management

How we brought efficiency and order to our client's complex finances, post-sale

The situation

Our client, Robert, was a first-generation, self-made entrepreneur. He sold his technology business in 2007 for \$65 million. From his investments to his budget, Robert's complicated finances were not in order post-sale. He owned properties, but until he sold his company, he had never been involved in day-to-day financial oversight. Everything was new to him, and he needed help across his entire financial world.

The strategy

- Robert had traditionally diversified his assets across multiple financial firms.
- We served as the primary advisor to help him view his multiple relationships, which he eventually consolidated.
- Finnerty Partners took the lead among all his advisors—bookkeeper, CPA, attorney and insurance representative. We were his main point of contact.
- We interviewed attorneys and CPAs that would best fit Robert's needs. We also helped him find a bookkeeper to manage his large estate.

- Overall, we focused on simplifying Robert's life by coordinating meetings with all his professional advisors.
- We used UBS Wealth Way, a comprehensive approach that helped the client organize his financial life into three key strategies: **Liquidity. Longevity. Legacy.** This gave the client a sense of confidence knowing we were addressing his short and long-term priorities, including his mortgage, lending, insurance, college funding and estate planning strategies.

The results

- Enjoying his own efficiently run finances, Robert referred us to other family members and his business partner.
- We work with his wife and trustee to manage his children's trust funds.
- Robert continues to attend exclusive Private Wealth Management events to build his personal and professional network and to stay informed, including the Europe Jazz Festival, Art Basel Miami and the Global Family Office Forum in New York City.

Finnerty Partners

UBS Financial Services Inc.

1501 K Street NW
Suite 1100
Washington, DC 20005

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Time frames may vary. Strategies are subject to individual client goals, objectives, and suitability. This approach is not a promise or guarantees that wealth, or any financial results, can or will be achieved.

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