Communication

Discovery

- Identify your priorities, goals, concerns and values
- Uncover your specific financial objectives surrounding your liquidity, legacy and longevity needs
- Perform a thorough accounting of all assets and liabilities

Wealth planning

- Develop an estate planning strategy that reflects your objectives regarding the distribution and management of multigenerational wealth
- Ensure that assets are titled correctly and lifetime gifting opportunities have been addressed
- Identify strategies that achieve your philanthropic and legacy goals

Investment strategy

- Draw upon the experience of Madison Park Partners with UBS's platform of global investment solutions to provide unbiased investment advice
- Recommend investment solutions based on our analysis, customized to meet your unique needs
- Construct an investment plan that reflects your goals and adjusts to market conditions

Commitment to service

- Collaborate with your existing tax and legal advisors to make sure your investment plan is working in conjunction with your objectives
- Provide ongoing reviews and evalutions on portfolio construction and performance
- Strive to be responsive, accessable, candid and proactive