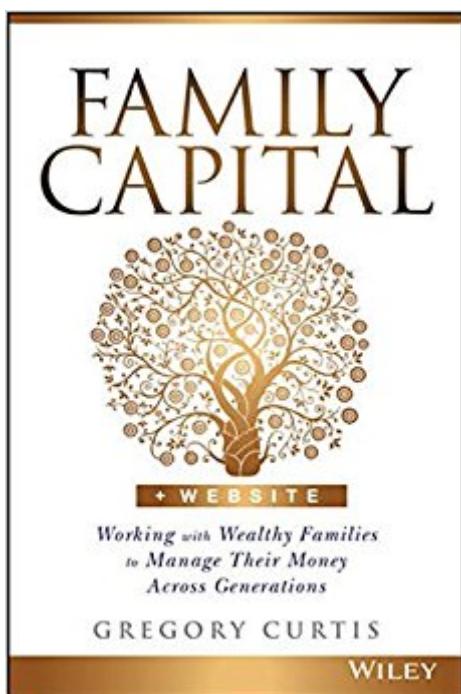


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# Family Capital: Working With Wealthy Families To Manage Their Money Across Generations



## Synopsis

The lifelong guide to effective family wealth management strategy Family Capital provides a unique and practical lesson on wealth management. Instead of lectures and dry discussion, this engaging book follows an archetypal wealthy family through several generations and collateral family units to show you what effective family capital management looks like long-term. You will actually listen in on meetings between the family and its wealth advisor as they grapple with the many challenges family investors face. Expert wealth advisor Gregory Curtis provides advice and insight along the way, explaining why each strategy is effective, and how you can put it to work for you. You'll learn how to find an advisor you can trust, how to evaluate their performance, and how you can take the lead role in managing your wealth with the right advisor by your side. Estate planning and portfolio design are explored thoroughly to help you understand what makes sense for your family, and the companion website provides important forms and additional resources that help you put your plan into action. You've worked hard and done well, but the work isn't over. It's important to protect your wealth and make the right decisions to ensure that your family capital remains strong enough to benefit future generations. This book gives you a lifelong guide to effective wealth management, with expert insight to answer your most pressing questions. Find your ideal wealth advisor Design and build your investment portfolio Monitor your investments and your advisor's performance Utilize trusts and other estate planning vehicles to your fullest benefit The best way to learn something new is to hear lived experiences alongside expert commentary. Family Capital provides real-world perspective balanced by professional context, so you can tailor your next move to best suit your own situation.

## Book Information

Hardcover: 352 pages

Publisher: Wiley; 1 edition (January 26, 2016)

Language: English

ISBN-10: 1119094135

ISBN-13: 978-1119094135

Product Dimensions: 6.4 x 1.2 x 9.3 inches

Shipping Weight: 1 pounds (View shipping rates and policies)

Average Customer Review: 5.0 out of 5 stars 3 customer reviews

Best Sellers Rank: #631,002 in Books (See Top 100 in Books) #202 in Books > Business & Money > Finance > Wealth Management #5439 in Books > Business & Money > Personal

## Customer Reviews

You've worked hard and done well, but the work isn't over. It's important to protect your wealth and make the right decisions to ensure your family capital remains strong enough to benefit future generations. Family Capital shows you how to manage capital and stay on top of the wealth management business the best way possible; through firsthand experience observing the meetings, decisions, and results of a family trying to sustain and grow wealth across generations. Author and preeminent authority on advising the very wealthy Gregory Curtis culls the private conversations and family dynamics from more than four decades of his practice, illustrating successful family wealth management through the rise and potential collapse of the fictitious Titan family fortune. Along the way, you see how to find an adviser you can trust and evaluate his or her performance, as well as what it means to take a leading role in managing your family's wealth, and how to work with the right adviser. You will keep this innovative treatment of a typically dry subject at your fingertips for its: Insightful attention to how the human side of wealth management affects tactical investment decisions Word-for-word conversations portraying how life-changing decisions and missteps are made in the real world Top-tier expertise in estate planning and portfolio design and guidance for understanding what makes sense for your family or client Family Capital features a completely new level of hands-on support with chapter-by-chapter extras that let you fully engage with covered material, as well as critical forms you can customize and use in real-world practice. The Titan family story unfolds cover to cover, but chapters are conveniently edited so you can easily reference complete topics. Wealthy families face enormous obstacles to sustaining their wealth, and Family Capital prepares you for the conversations to overcome the most common ones.

**A FIRSTHAND PERSPECTIVE ON FAMILY WEALTH MANAGEMENT BEST PRACTICES** Family Capital is the refreshing new guide to managing wealth for the very rich. Instead of lectures and dry discussion, this vividly engaging book follows an archetypal wealthy family through several generations of fortune and misfortune to show you what effective family capital management looks like long term in the real world. You sit in on actual meetings between the family and its wealth advisers as they grapple with the many common challenges family investors face. Expert wealth adviser Gregory Curtis interjects revealing advice and insight along the way, explaining why each strategy is effective, and how you can put it to work for you. By the time the family's destiny

has played out, you will be able to: Find your ideal wealth adviser Design and build your investment portfolio Monitor your investments and your adviser's performance Use trusts and other estate planning vehicles to your fullest benefit Family Capital provides you with an exclusive skill set of knowledge and online resources for guiding families out of the shirtsleeves-to-shirtsleeves cycle of wealth.

This veteran financial advisor with his 3rd book takes a brilliant fictional approach by creating the mythical Titan family, headquartered in Pittsburgh where the author has lived and advised wealthy families and institutions for years. Having lived and worked in Pittsburgh for many years with a wealthy family there, I was so intrigued that I immediately delved into the book and read it in one sitting. The book may not prove to be a best seller as there are likely not millions or even thousands of families who are as wealthy as the fictional Titans, but for general advice on the sophisticated business of sustaining a large family fortune, it sorts out the complexities which many less wealthy families also have and let's everyone look at how tough it can be to sustain wealth, thus avoiding losing it all, as the old "shirt sleeves to shirt sleeves in 3 generations" opines. Knowing family members who might benefit from reading this book, I ordered multiple copies on which afforded me a neat way to take care of future gifting!!! A lot of what Curtis has to say applies to many less wealthy families. However sophisticated one becomes constantly getting educated as Henry Adams advised is especially relevant in today's rapidly evolving family management and investment scene. The price of the book is minuscule compared to the wisdom it imparts; go for it.

Truly fascinating! relevant to the current financial environment. I am very impressed with the way Mr Curtis tells the story of the Titan Family that takes place in Pittsburgh, PA. One great thing about the book is the way Mr Curtis developed the characters. Each person has a definite personality. I would recommend this book for anyone who needs to augment his or her knowledge of finance and capital preservation. Out of Five stars, I would give this book five.

Good way to explain client meetings and relationships, but the audience is limited to (a) financial advisors to high net worth families, and (b) such clients--to learn how you should expect to be treated.

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