

Client case study

Diversifying around a single concentrated stock position

Integrating the client's existing and planned direct investments with our recommended managers and strategies

Blending investment strategies with a set of complex tax and estate planning structures

Growing real purchasing power for future generations while maintaining liquidity and safety for the senior generation

Greycourt has worked with ADHERE for the past 12 years. They were introduced to Greycourt by one of their advisors who previously worked with a large trust bank.

Partnering with the family and its trustees, we have helped to diversify their concentrated stock position (the primary source of wealth), construct portfolios in an optimal manner around the remaining stock and design an overall wealth strategy that is focused on the family's primary goal of growing future generations' purchasing power without incurring undue degrees of risk.

The family has also begun to express interest in impact investment strategies and Greycourt has assisted them in identifying impact strategies that work with the overall investment program designed for them.

AT A GLANCE

5
FAMILY MEMBERS

6
INVESTMENT COMMITTEE MEMBERS

24
TRUSTS

12
CUSTOMIZED ALLOCATIONS