



# Private Wealth

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Service Offerings for AWP's Private Wealth Clients



ATLANTIC WEALTH  
PARTNERS

# A Comprehensive, Outcome-Driven Suite of Private Wealth Services

Our unique approach to Private Wealth Management is designed to provide you with comprehensive, focused expertise.

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Life and Business changes, along with new opportunities, occur throughout every year. These events impact your financial well-being and take on a domino effect, impacting investment risk/ return considerations, tax, legal, estate, and asset protection requirements and outcomes. We offer a comprehensive approach to managing private wealth across the spectrum.

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## Trust & Estate Planning

# In support of your legacy.

Whether you want to leave your assets to your loved ones or to your favorite charitable organization, we can help you design your estate planning strategy as a part of our overall family plan.

Our team of estate planning professionals will coordinate and collaborate with your legal and tax counsel to ensure that as much as possible is transferred to your heirs.

It is our goal to help you achieve personal peace of mind that when the inevitable comes, all of the pieces are in the puzzle.



## Charitable Giving & Philanthropy

# Give greater.

For some, charities and philanthropic activities are incredibly important. We feel the same way, and can help you explore different investment and estate planning vehicles to help you drive the success of your philanthropic endeavors.

**Donor-Advised Funds** (DAFs) are often used as a replacement to a private foundation. We will guide you through this process and help you execute your wishes.

**Charitable Trusts** are a smart way to support causes that you believe in by integrating them directly into your estate plan. These gifts can be done more tax-efficiently for the organizations that you care deeply about.



## Asset Protection & Privacy Planning Strategies

# Fortify your life.

You've worked hard to accumulate your assets. We help support you in protecting them. You can have the best investment or financial plan but could all be for nothing if you don't protect what you have.

Our asset protection planning strategies are designed to manage risks associated with creditors, predators, taxes, divorce and probation, aiming to support your family's financial wellbeing.

There is a vast amount of data readily available on the internet by doing a public records search. We help our clients structure their assets and their financial household in such a way that it becomes more difficult to find what they own publicly.

Our goal is to keep as much of your information out of the public eye using little known strategies that we will help you execute on.

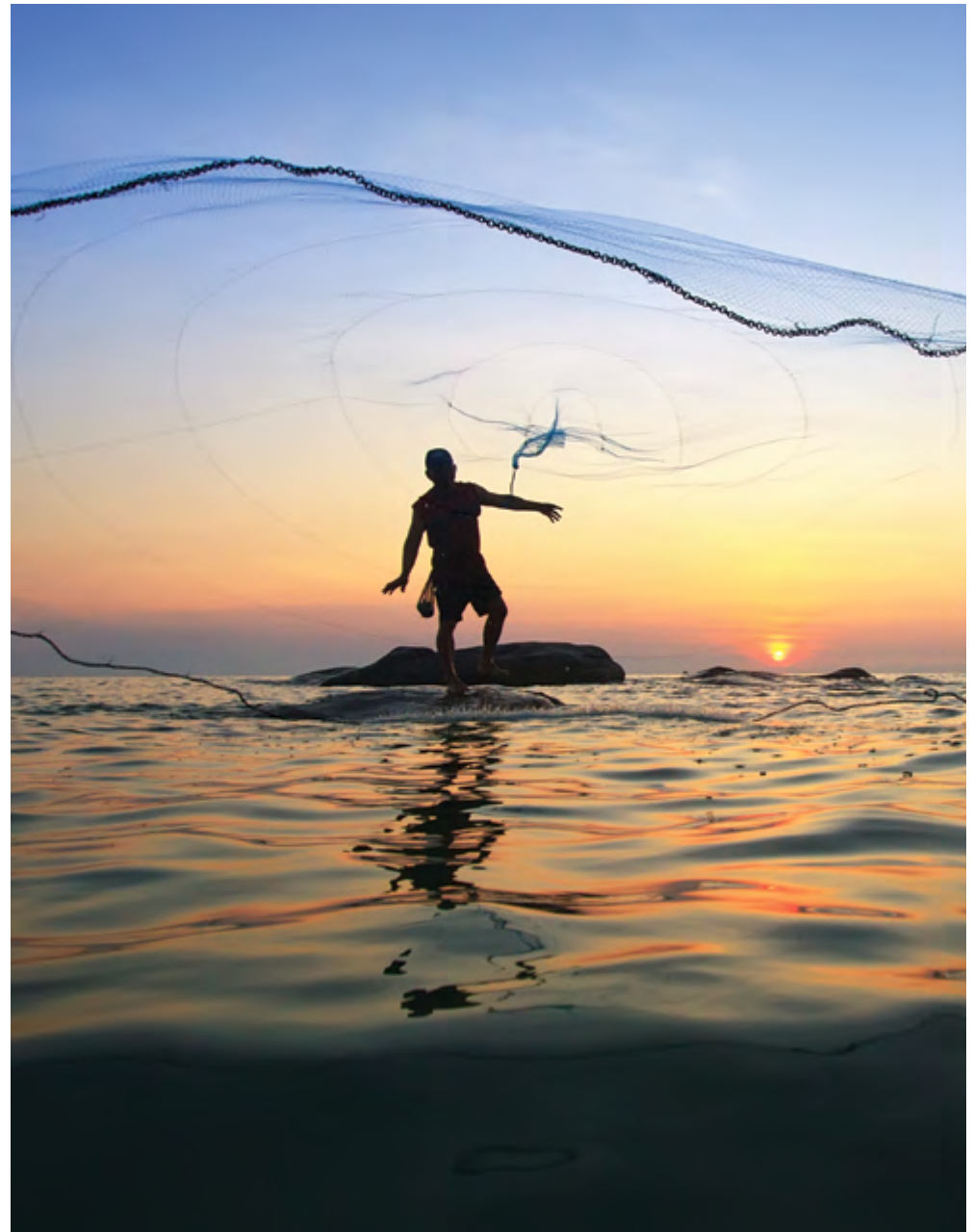


## Tax Minimization Planning

# Capture more of what you earn.

We strongly believe that the money you earn should be yours to do with what you wish. Our approach focuses on efficient wealth management and tax planning, with the intention of benefiting your family's financial future. We will provide you:

- Proactive tax exposure management for long-term savings
- Strategic tax oversight
- Entity selection for investments through family partnerships, trusts and individuals
- Comprehensive tax impact projections for investment decisions and opportunities
- Family and entity structure analysis to minimize tax impact and protect assets
- Tax impact of executive compensation plans including deferred plans estimation
- Evaluation and implementation of trusts and similar vehicles
- Analysis of charitable gift planning options to maximize tax benefits
- Analysis of policy and tax law changes
- Tax planned investing
- Tax preparer coordination
- Tax document management



## Portfolio Management

# Aligning efforts to reach your goals, and yours alone.

Atlantic Wealth Partners, LLC does not manufacture any products. We do not receive back-door compensation from any investment provider. Therefore, the portfolios we manage hold positions that we can objectively say are the most appropriate for our clients.

Depending on the needs of our clients, we are either able to manage their portfolios in house, or by identifying, analyzing, and monitoring institutional quality money managers (those that manage major endowment funds and pension plans).

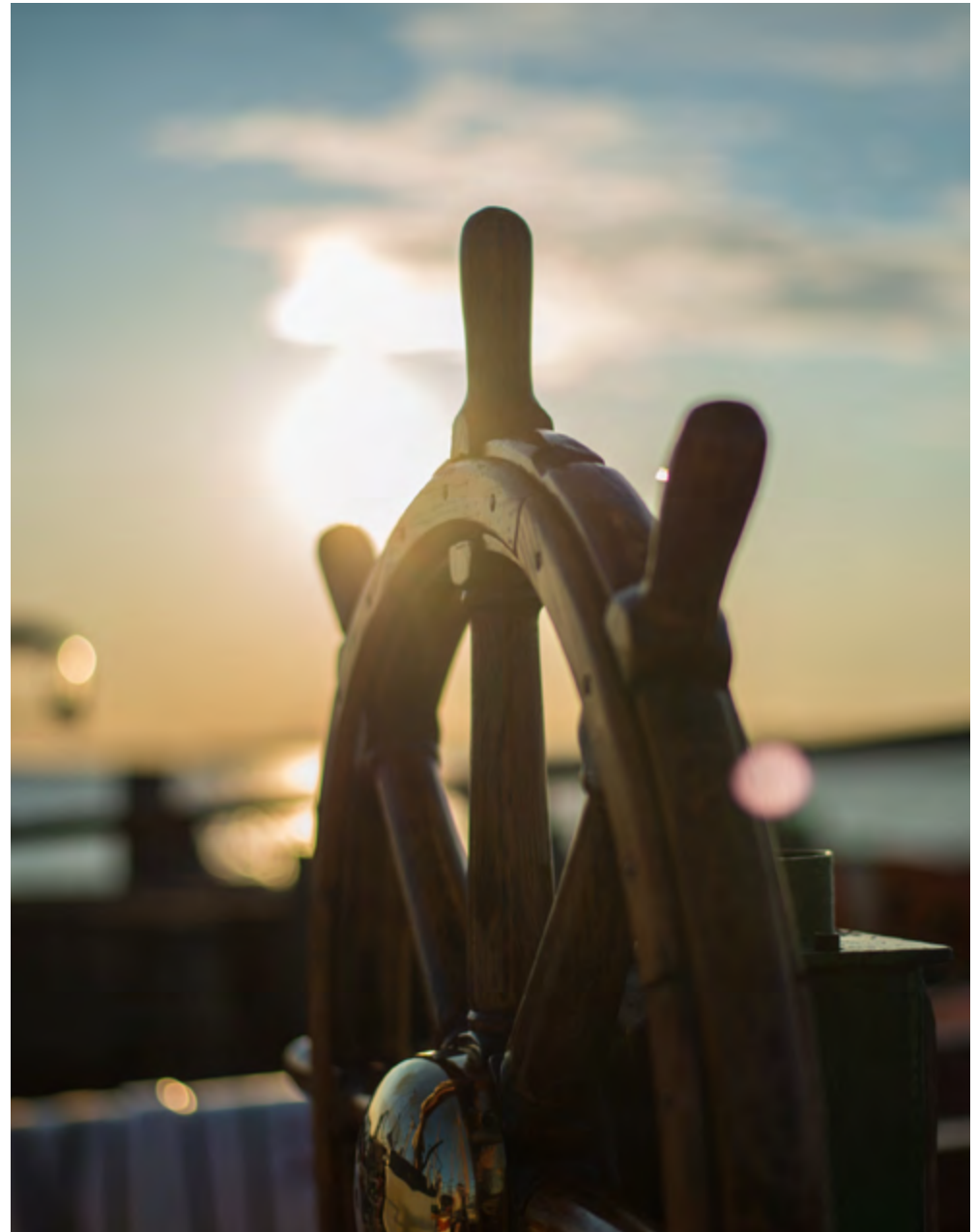


## Retirement Planning

# Providing your desired income.

A large concern of many people entering retirement is replacing their monthly predictable income that they receive from their paycheck. We design financial plans and custom investment portfolios to meet both your required and desired incomes needs.

- Navigate pension and deferred compensation plans.
- Navigate complicated benefits packages (ISO's, NSO's, Top Hat Plans, Etc.)
- Coordinate the compliance with various firm and SEC requirements for employees and board members of publicly traded companies.
- Develop a strategic income plan with a focus on minimizing short and long-term tax impacts.
- Develop reasonable projections for long-term asset values and income.
- Support asset protection efforts with strategies designed to assist in managing risks related to creditors, predators, divorce, and taxes.
- Enhance your understanding of buy/sell decisions and the rationale for your holdings for informed portfolio management





## Real Estate Opportunities

# For a structurally sound portfolio.

We believe that real estate is a vital piece of one's investment puzzle. Rather than defaulting to a recommendation that you sell your properties, we prioritize understanding your unique situation first, ensuring that our advice aligns with your specific financial goals.

- Insulate wealth and assets from excessive exposure to litigation from joint venture partners, tenants, lenders and creditors.
- Use little known strategies to minimize estate tax liabilities, while keeping your balance sheet strong, so you remain attractive to lenders.
- Save on the costs of insurance, lending and professional service fees, as duplicate and sometimes excessive fees are able to be drastically reduced.
- Manage debt maturities and shop financing alternatives to minimize interest expenses.
- Increase speed and ability to capitalize on new opportunities through precise cash flow management and optimization. Free up liquid resources to do more and larger deals.
- Objectively analyze and review new asset purchase decisions and assist with due diligence.
  - Analyze asset investment performance and objectively recommend assets for disposition only when appropriate.
- Liquidate assets in the most tax-efficient manner.
- Review over-concentration/liquidity concerns in a market downturn.



# Partner with us.

See how our suite of private wealth services can benefit your unique circumstances.

**Request a consultation at:**

[atlanticwp.com/contact](http://atlanticwp.com/contact)

**Or, call us at:**

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**It's Not You. It's We.**

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