Gresham

A Golden Opportunity – Wealth Transfer Planning in 2020

CHICAGO – October 5, 2020 – Kim Kamin, Gresham Partners' Chief Wealth Strategist, recently described reasons certain wealth transfer strategies are particularly attractive currently and specific strategies that can take advantage of them in a presentation to Gresham clients and friends on September 17th. A recording of that event, which also included two of Gresham's Client Advisors – Lee Morava and Les Carter – describing how some of our clients have implemented the strategies, can be accessed with this link: A Golden Opportunity-Wealth Transfer Planning in 2020 on 9/17/20.

Additionally, a piece by the same name authored by Kim that describes the reasons and strategies that were covered in the presentation on the 17th can be accessed here.

About Gresham

Gresham Partners is an independent wealth management firm that has been providing investment and wealth planning services to a select group of ultra-high-net-worth individuals and families since 1997. Owned entirely by our senior professionals, we manage or advise on over $6 billion for about 105 families* located nationally.*

We focus on keeping our interests aligned with our clients' interests by avoiding trust-eroding conflicts that are inherent in many firms. We attract discriminating clients – professional investors, business owners and C-Suite executives – with the highest standards who expect exceptional investment performance and client service.

Our unconventional investment approach has protected and grown our clients' capital over time by using difficult-to-access managers that are located globally, invest in a full range of asset classes and are unaffiliated with Gresham. We integrate our investment services with comprehensive wealth planning, holistic reporting and other family office services that are designed to contribute to the financial and emotional well-being of our clients.