Personal Financial Planning

Our Services

Portfolio Management

- Tailored-made investment advice in accordance with your lifestyle goals, income requirements, risk tolerance and tax position (penalties or exit fees).
- Investment portfolio monitoring
- Asset allocation

Estate & Legacy Planning

- Asset transfer, administration and disposal (e.g. divorce settlements, dispute resolution between heirs, etc)
- Asset valuation
- Wealth structuring for assets based in multiple jurisdictions divided amongst multiple beneficiaries
- Risk mitigation and liquidity planning

Family Office Services

- Comprehensive review of family wealth
- Family office establishment
- Accounting and/or trust administration support
- Dispute resolution

We offer a wide range of services, but in case don't offer the service/product that best suits your needs, we will source the best professionals and get the job done.

If you have any questions regarding our services please do not hesitate to contact us at info@emergowealth.net or +357 22 449122

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