Charting the course

One family at a time

Who we are and what we stand for...

Barclay Breland is a boutique family office services provider delivering the following services through a non-traditional platform by seasoned professionals:

- Investment management
- Trust and Estate Planning
- Risk management

Our mission is to develop your family's ideas and aspirations into active planning and execution, connecting passion with purpose and reveling in the process. As a Registered Investment Advisor, we follow the fiduciary standard, meaning any and all recommendations Barclay Breland makes for a client is in their best interest, going above and beyond just a suitable option. We also pride ourselves in being able to quickly provide unique and alternative investment opportunities should the needs of our clients change over time.

Our Goals & Objectives are to:

- Eliminate Costly "Gaps" in Tax & Estate Planning by getting all of the family's advisors working together as a team
- Improve Transparency and Reduce Fees
- Organize and Coordinate our families' financial relationships and provide integration and oversight over all their advisors
- Provide due diligence and recommendations on all recommended financial products, services and strategies

- Educate our families on aspects of their wealth including investments, philanthropy, governance, and generational planning