RICEBARRETT
FAMILY WEALTH

Our Mission

Our mission is to be a premier wealth advisory firm for multiple generations of successful families through our deep commitment and exemplary service. Emphasizing quality over quantity, we guide generations of families in achieving their financial priorities by engaging our core principles:

- We provide wealth advice and guidance aimed at preserving and expanding wealth for families so they can realize their retirement,

- We create comprehensive financial plans that reflect our experience and expertise and then *follow-through* by coordinating the implementation; thus we provide enduring value for our clients and their families' futures.
- We choose clients who believe in our wealth preservation and expansion philosophy and who have confidence in the value for them of our honed areas of specialty experience as well as in our ability to access the finest tools, solutions, and outside human capital.
- We stay on top of our clients' day-to-day banking activities, especially as they move about in travels, to make life simple with a single point of contact.
- We appreciate clients whose fundamental core beliefs match our own, who are centers of influence in their professional lives and in their communities.

Company Overview

RiceBarrett Family Wealth provides financial guidance to assist successful families in preserving and expanding their wealth by utilizing tax-efficient strategies. Our exclusive focus is delivering comprehensive service to multi-generational families through close relationships and personal, customized strategic financial plans that help clients achieve their retirement, health, philanthropic, leisure, and family life goals. Our core values are aligned with those of our clients, which enables them to be confident in our ability to deliver the most intelligent financial solutions and strategies. As an independent firm, we are ideally positioned to

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At the center of our universe: client relationships.

Our team has unique skill sets that enable us to customize the flavor of our services depending upon the specific needs of each family — and we leverage these strengths to provide our client families with the utmost in personal service. We offer customized advice that takes into consideration all aspects of client lives as we assist in preserving and expanding their wealth.

Our financial strategies — backed by education, experience, ongoing training, and loyalty — reflect our commitment to serving client families, operating in their sole and best interests at all times. When our clients succeed, we succeed — it is that simple.