Matthias
PRIVATE WEALTH

About Services Client Login

A Family Office Focused on **the Future of Yours.**

Who We Are

Founded as a comprehensive, full-service family office, we were originally designed to serve our own family's diverse wealth management needs. Other high-net-worth families observed the strategic power and convenience of our family office and sought a firm who walks in their shoes. Since we are clients like you, our interests are mutual and our vision is the same – this is our hallmark. From inception, we understood the true value of consolidating skilled professionals and services under one roof where other firms did not. As clients ourselves, we demand investment independence as we invest alongside you. We are an extension of your family, enabling you to accomplish your life goals and championing your legacy.

Learn More

enable clients and families over multiple generations to utilize their talents and pursue their interests and life's . That is our privilege and our legacy."

– Skip Matthias

Our Family Office For Your Comprehensive Wealth Management

- » INVESTMENT
- TAXATION
- ESTATES, TRUSTS & CHARITABLE GIVING
- CASH FLOW
- PERSONAL & TRUST FINANCES
- BUSINESS ADVISORY
- ADDITIONAL SERVICES

Learn More

Full-Service Under One Roof

The professional depth of our founding family sets us apart.

While most offices can only refer you to or recruit outside professionals, we are multiple generations of our own successful attorneys, tax specialists, fiduciaries, investors, and other wealth management specialists. Our background enables us to optimize our family office's professional talent and makes us keenly aware of the convenience and strategic power of aggregating our collective knowledge under one roof.

Our family office collaborates across disciplines. When investment, estate, tax, and other services are outsourced to separate silos, costly mistakes occur – misinformation, missed deadlines, and the "dropped ball effect". Our office takes ownership of your broad wealth management tasks relieving you of the burden of coordination and oversight across multiple professionals. The result is a seamless experience simplifying the complex landscape of wealth management and allowing us to focus on our primary objective – the life and generational success of our clients.

lependent Investors

vest alongside our clients and so our interests are one and the same. We investment independence and do not accept commissions. Investment es are driven by needs, not third party dealings. We aren't bound to specific rage firms or managers and so our clients benefit from diverse investment tunities including private placements. We use sub-advisers to manage dual equities, harnessing the brightest, most capable minds across all asset s and sectors. Our sub-advisers become part of our collective partnership our one-roof, enhancing performance, again to our mutual benefit. Life change and investment independence keeps your portfolio performing daptable.

Enabling Your Growth

Many of our new clients arrive mired in the complexities of their own wealth, unable to recognize the extent of their own personal potential. We cut through the noise to provide a firm financial foundation that ensures your ability to lead a fulfilled life with focus and direction. Enabling you to fully leverage your gifts and talents as you evolve and grow is our mission. To us, you're a part of the family. We want you to succeed. This is our calling.

A Trusted Partner in Your Legacy

Building, sustaining, and transferring legacy wealth is always a priority. As a trusted partner, we execute your personal, long-term financial strategy and marshal your larger wealth enterprise. Many families experience the "shirtsleeves to shirtsleeves in three generations" phenomenon where wealth is built, held, and quickly lost. This is not our story, nor should it be yours. We have real-life experience to help your family develop a cohesive, grounded plan. We are thorough with our estate planning and intentional about succession. Beyond these formal processes, we know your values, vision, family and the nuances of your personal story. We are your trusted partner in securing your legacy.

"Many of our prospective clients share stories of their constant challenge to integrate their closely held business finances and personal wealth under one roof. Specifically, clients struggle to create synergy between business operations, personal wealth management and protection, real estate, and retirement/estate planning when each of these services is handled by a separate entity. We hear complaints that no one group knew what the other group was doing. At Matthias Private Wealth, we provide a much needed seamlessness for clients who own their own business or who have unique assets. Our clients experience clarity of vision as all aspects of their affairs are coordinated under one roof. This frees our clients to concentrate on the things that are really important in life."

– Skip Matthias

Perhaps our greatest calling is enabling you to fully realize your potential and leverage your gifts and talents at any age. We provide a firm financial foundation on which to stand so that you can lead a fulfilled life with focus and direction.

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