SUMNICHT & ASSOCIATES LLC
FAMILY WEALTH MANAGERS

1988 25th Anniversary 2013

Vernon C. Sumnicht, MBA, CFP®
One of "Worth's Top Wealth Advisors"
(2005, 2006, 2007 & 2008) Learn More

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Latest Update: Online Educational Seminars

Many firms provide investment management services, yet few successfully integrate them into a family wealth management offering. Sumnicht & Associates, LLC provides financial, investment, and estate planning solutions that work together to support your unique needs and objectives.

Our core strength is our wealth management professionals, who have extensive industry experience and are committed to superior client service. They include Financial Planners, Certified Public Accountants, Chartered Financial Analysts, Masters of Business Administration, and Investment Managers who understand how to create innovative wealth management solutions.

Personal service will define all aspects of your relationship with Sumnicht & Associates, LLC. By bringing together a team of specialists to support your goals, we deliver exceptional care and attention. By listening before acting, we provide advice that anticipates and responds to your unique requirements.

Sumnicht & Associates, LLC manages investments for families, foundations, trusts, and institutions, and offers access to a full complement of asset classes and investment alternatives. Our services, while diverse, are driven by a single priority -- the integrated wealth management needs of our clients. Backed by a tradition of excellence, we deliver our advice without the distractions or conflicts of interest that characterize less-focused institutions.

Sumnicht & Associates, LLC services provide expert assistance and coordination of the following elements:

- Financial Counseling
- Investment Policy
- Asset Allocation Strategies
- Investment Management
- Multi-Manager Investment Program
- Alternative Investments
- Customized Portfolio Performance Reporting
- Portfolio Structure & Diversification Strategies
- Insurance Counseling
- Tax Planning
- Trust & Estate Planning
- Intergenerational Wealth Planning
- Family Governance Solutions
- Control & Succession Issues
- Fiduciary Services & Trust Administration
- Generational Transitions
- Education of Future Generations
- Foundation Services
- Charitable Giving Strategies
- Philanthropic Advisory Services
- Corporate Trustee Services
- Custody & Master Custody Services

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