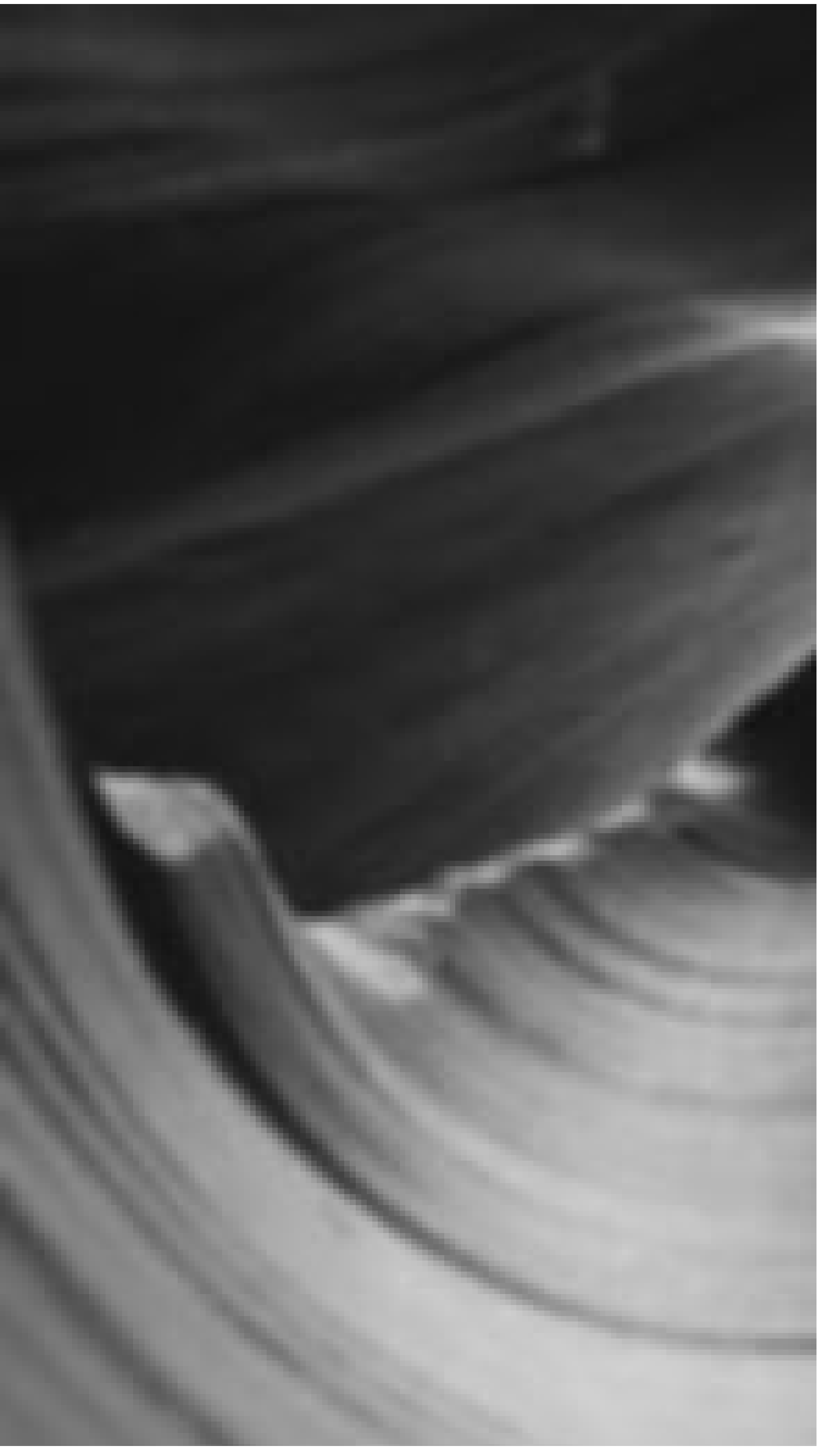
Founded in 1983 as a single-family office; the founding family remains a client now spanning four generations



charitable foundations and endowments

High staff-to-client ratio

Our client reach is national

Our services are most appropriate for a family with a net worth in excess of
$25 Million

Over $1.7 Billion in assets under management*

We have $325 Million committed to our Private Equity program since 1990*

**as of December 2017*

You are listened to and heard.

You receive objective, expert counsel.

Your affairs are thoughtfully managed.

Your investment program is disciplined and sophisticated.

Your experience is exceptional.

There are many ways CM Wealth Advisors creates value in addressing the unique opportunities affluence presents to individuals, families and foundations.

The following client stories describe the scope of our services.

We listen, assess, and present a comprehensive wealth plan, tailored for you by collaborating and harmonizing with your current professional advisors, accountants, attorneys and outside investment managers to simplify your life, giving you and your family peace of mind.

CEO of a Large Multi-National Company Receives Unexpected Services

When the CEO came to us, he was in search of a firm that could manage a portion of his significant portfolio. What he received was much more than that.

Connecting the Business and Personal Financial Pictures
At the time he began working with us, the CEO was preparing for the sale of the business, a liquidity event that would greatly impact his family's lifestyle. Although he came to us for our investment management services, we counseled him on choices and planning for this impactful event and beyond. We helped him strategize for minimizing tax consequences, analyzing payout structures, managing real estate holdings, designing a private family foundation, arranging family office concierge services, and, most importantly, conducting financial planning for his entire family.

•First, our investment and tax professionals assessed the CEO's anticipated financial windfall and provided a sophisticated analysis with objective advice.

•The CEO chose our services for managing current and future real estate holdings. We assisted with the vetting, insuring and acquisition of the real estate properties as well as handling conservation easements.

•The CEO also needed help with private air travel needs. Our family office professionals vetted and presented various private air travel options to best fit his requirements. These options included jet cards, fractional ownership and charter.

•The CEO and his family sought our guidance in creating a private foundation for their philanthropic endeavors. As part of this service we distribute all donations, maintain the foundation's books and prepare the tax returns.

•Annual meetings are important to this client and his family. The client prefers two meetings per year – one for a deep dive into his investments, and the other to discuss family financial planning as well as estate and charitable planning.

None of the examples presented here should be interpreted by you as a guarantee that you will experience the results you desire to achieve by engaging us to provide advice or services. These stories are a composite of services offered to clients and do not represent a specific client or client experience.

Connect With Us

Name *

Email *

Subject

Message

CLIENT ACCESS

ADV REPORT

PRIVACY POLICY