CREATING THE FINANCIAL OPPORTUNITIES TO PURSUE YOUR GOALS

OUR PASSION AT WATTS CAPITAL IS PROTECTING AND GROWING THE WEALTH OF PRIVATE FAMILIES. OUR CLIENTS RELY ON US AS FIDUCIARIES TO DELIVER WORLD-CLASS FINANCIAL PLANNING AND IMPLEMENTATION, INVESTMENT MANAGEMENT AND TAX PLANNING.

FINANCIAL PLANNING

Our clients rely on our team of Certified Financial Planners™ to evaluate their individual financial situations, formulate a plan, and then implement the plan across seven major areas of their financial lives. Our team brings specialized expertise in serving business owners and individuals contemplating or going through divorce.

INVESTMENT MANAGEMENT

Our clients have a wide range of goals, values and constraints in how they wish us to manage their investments. We tailor each client's investment policy to serve their specific needs. In addition to stewardship of our clients' core stock and bond portfolios, we differentiate ourselves through our experience in complex alternative investments, including real estate, hedge funds, direct investments and private equity. Our investment strategies are led by a team of CFA® and CAIA professionals.

TAX PLANNING

During our clients' lives, income tax is often their single biggest expense. Income tax and estate tax is often our clients' largest obstacle to passing their wealth to family members and funding other elements of their legacy. We work with our clients to structure their financial affairs in a way that reduces taxes, leaving more money for them to achieve what is important to them.

PRIVACY (/PRIVACY)   DISCLOSURES (/DISCLOSURES)