

**PROFICIO
CAPITAL
PARTNERS**

Proficio // verb // Latin // contribute, assist, benefit, help, profit



PROFICIO CAPITAL PARTNERS is a manager of both liquid and illiquid financial assets operating under the direct oversight of family trustees or administrators.

**PROFICIO CAPITAL PARTNERS OFFERS THE FOLLOWING
SERVICES:**

Proactive advice – a function of low client to employee ratio and frequency of meetings

Objective financial advice

Creative solutions to financial issues

Clearinghouse for financial, investment, tax and estate planning ideas

Cross-fertilization of ideas resulting from solving issues for multiple families

Advice from professional team with diverse backgrounds

Coordination of other advisers/wealth managers

Delivery of “best of breed” money managers, custody, insurance, loans, etc.

Negotiated cost savings with other financial providers (e.g. investment management, custody, trading costs)

Integration of client's estate planning, income taxes, investments, philanthropic goals and family situation

Club Deals – Co-Investing, network, and collaboration with other family offices who share a similar investment thesis.

Select Private Placement access in domestic entrepreneurial businesses