



**GENCREST**  
CAPITAL PARTNERS

SIMPLIFYING YOUR COMPLEX FINANCIAL LIFE.

*Elevating expectations for service and attention to detail.*

At GenCrest, we provide robust and inclusive family office services for a seamless, integrated approach to generational wealth. Our team of financial professionals work together to help affluent families plan, manage and grow to their full potential. We are dedicated to providing the highest level of care and service to support your family's goals.

**A family office model crafted around you.**

We go beyond traditional advising services to understand and empower the values that make your family unique. Our team customizes an entire hub of services for you with advisor-led industry professionals in investments, tax planning and preparation, estate planning, insurance and more.

We offer family appointments for including and educating heirs, helping inspire a shared perspective on your family's legacy.

Plus, we provide concierge services designed to enrich your lifestyle, from philanthropy planning to quality-of-life enhancements to career counseling and other personalized guidance.



Scan the QR Code to request an appointment  
with our family office team.



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## *Frequently Asked Questions*

### **How do family office services differ from traditional investment services?**

There are many challenges to growing or maintaining wealth from generation to generation that reach well beyond investment strategies alone. Along with financial, tax and estate planning, family office services take a holistic approach to help fulfill a family's shared legacy and lifestyle goals. At GenCrest, our team works with every family member to help ensure the preservation of wealth and values for future generations and to enrich the family culture and quality of life.

### **Why are family office services so critical for preserving multi-generational wealth?**

Quite simply, most high-worth families struggle to maintain their wealth beyond two generations. A study by J.P. Morgan Private Bank found that only 54 of the 400 1982 Forbes Wealthiest Americans were still on the list by 2003. Overall, 85% of America's wealthiest individuals had dissipated their wealth, largely because of poor financial management.<sup>1</sup>

"Beating the Odds." J.P. Morgan Private Bank. <https://www.bbref.co.za/content/uploads/2018/06/Beating-the-Odds-and-Staying-Wealthy.pdf> [Accessed 13 February 2025]

### **What is family capital?**

Family capital refers to the three different forms of family wealth: human capital, which are the family members themselves; intellectual capital, referring to the knowledge, skills, values, and dreams of those members; and financial capital, the physical and financial assets that the family owns.

Remember that human and intellectual capital are much more important to your family's happiness, comfort, and long-term success. Financial capital offers the means to enrich and secure opportunities to elevate them.

### **What are the keys to an enduring family legacy?**

While it would be easy to point to investment strategies, tax and estate planning as vital pieces to preserving wealth, we see the key as something much more fundamental. Our experience suggests that successful multi-generational families need a shared sense of purpose, grounded in a long-term view of the family's future.

It is vital to discuss as a family the values and priorities of the family as a whole, including a mission statement that puts a shared purpose and direction into words. This gives focus to family wealth that transcends a single generation, setting forth pathways for fulfilling goals for the future.



**Have more questions? Talk with us.**

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