THE UPPERCRUST

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FAMILY WEALTH OFFICE

UpperCrust Wealth

Private Wealth Advisory

We offer the highest degree of wealth management solutions by carefully selecting products from various assets classes from selected fund managers domestically and globally.

Family Office Advisory

We act as catalyst for those who have achieved various milestones by accumulating wealth in their entire life and would like them to grow without muddling into tax and compliance-related issues involved especially managing their estate, assets, and wealth.

EQUITY

We closely analyse equity class by incorporating detailed research.

FIXED INCOME

We evaluate fixed income products suitable for our clients' needs.

ALTERNATIVE ASSETS

We have selected funds, as well as we source them as per clients' needs.

DERIVATIVES

We use derivatives instruments to apply Hedge fund strategy and leverage them as risk management practices.

CLIENT ON BOARDING

While on boarding with clients, we effectively manage the following life cycle process:

- Initial meeting

- Understanding Clients' requirements

- Preparing Questionnaire

- Data Sharing & Privacy

- Rule based Investing

- Preparing Checklist

- Managing Expectation during set-up of Family Office

- Inter-community Privacy between the people in the loop

STRATEGIC ALIGNMENT

We follow strict guidelines during the engagement process with clients:

- Pre-decided frequency of Reviews and Restructuring

- Wider Options availability

- Sourcing Customized Options

- First few rounds of non-obligatory classification

- Preparing a Financial Plan

- Preparing a Roadmap

- List of Alternatives & Preferences

- List of Dos & Don't from both sides

- Risk Assessment & Analysis on Individual and Group of People front

- Execution of transaction

POST ENGAGEMENT MODEL

We hold holistic approach while engaging with clients and maintain their capital in a manner as follows:

- Handling & managing Held-away, and sourced products from our platform and/or falling under our scope of advisory

- Portfolio reviews periodically

- Rebalancing as per our pre-decided frequency

- Any specific occasional piece of advisory when needed

- Event specific iteration to the asset allocation

- Aligning your family culture values, beliefs while managing your wealth

- Sleeve to sleeve transfer of wealth while handling multi-generational wealth as a part of Estate Planning & Succession

- Interaction on making happy money and ideas exchanged on Philanthropy.

ENVIRONMENTAL, SOCIAL, GOVERNANCE FRAMEWORK

We actively focus on Environmental, Social and Governance issues as mainstream of our advisory services. The investors, family offices consider this as core of their interest, and would like to incorporate them while investing with assets.

Our assets selection process initiated with identifying the ESG framework which we consider as core our of practices.

UpperCrust Wealth Pvt. Ltd.

www.uppercrustwealth.com