# What is Vista Family Office?

Family offices are private wealth management advisory firms that serve high-net worth clients. We are different from traditional wealth management offices in that we offer a total strategy to managing the financial and investment matters of an affluent individual or family in an independent fashion. For example, we provide support with customized investment solutions, budgeting, insurance, charitable giving, family-owned businesses, and wealth transfer strategies. Wells Fargo Financial Network is the independent brokerage arm of Wells Fargo & Company which is one of the largest financial institutions in the United States with over $1.9 Trillion in assets as of March 31, 2018.

Providing advice and services for wealthy families under an independent comprehensive wealth management plan is far beyond the capacity of any one professional advisor. It requires a well-coordinated, collaborative effort by a team of professionals from the legal, insurance, investment, estate, business and tax disciplines to provide the scale of planning, advice and resources needed. Our office combines asset management, cash management, risk management, investment planning, lifestyle management and other services to provide your family with the essential tools for addressing the pivotal issues you face as you navigate the complex world of wealth management.

After a lifetime of accumulating wealth, you may be confronted with several obstacles when trying to maximize your legacy including estate and gift taxes, complex estate laws, and complicated family or business issues. A comprehensive wealth transfer plan must take into account all facets of your family's wealth including the transfer or management of business interest, the disposition of the estate, management of family trusts, philanthropic desires and continuity of family governance. Family education is an important aspect of Vista Family Office; this includes educating family members on financial matters and instilling the family values to minimize intergenerational conflicts. We work collaboratively with our team of advisors from each of the necessary disciplines to ensure your family's wealth transfer plan is well-coordinated and optimized for your legacy desires.

We treat your family as if it's our own!


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