Blossom
wealth management

George Salter, JD, MBA, CFP®
CEO, Founder

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COO, Founder

Step-By-Step Client Experience

Interview & Comprehensive Analysis

1. We collect your investment, tax and estate documents
2. You complete a client evaluation
3. We complete a dianostic on current wealth management solutions
4. We generate a cash flow chart
5. We create the investment plan

Vision & Strategic Plan

6. We finalize the asset allocation considering entity & generational opportunities
7. We identify, research and select the investment managers
8. We develop an asset migration plan
9. we negotiate account size minimums and fees with managers
10. We open your Blossom account
11. We provide assistance with viewing your accounts online and understanding your statement

Ongoing Monitoring & Education

12. Performance reporting
13. Quarterly client review meeting
14. Ongoing manager reviews
15. Evaluation of new investment opportunites & beneficiary audit
16. Education, client conferences & ongoing management of events

Family Values

- Mission statement
- Constitution
- Family dynamics planning
- Legacy

Income

- Forecast inflows and outflows
- Strategies for guaranteed income
- Tax optimization
- Liquidity Needs
  - i. Buy, build, renovate or refinance a home
  - ii. Large ticket purchases
  - iii. Education
  - iv. Tax obligations

Investment Portfolio

- Design and maintain portfolio
- Draft portfolio guidelines
- Evaluate, recommend and manage specific investments:
  - i. Strategic asset allocation
  - ii. Cash management
  - iii. Taxable and municipal bond management
  - iv. Public equity
  - v. Real estate
  - vi. Alternative investment strategies

Small Business Owner

- Growth capital and financing
- Design succession plan
  - i. Family limited partnership
  - ii. GRAT
  - iii. Installment sale to family
  - iv. Sale to outside party
  - v. Buy sell agreement
- Discuss valuation techniques

Asset Protection

- Hedging, monetization, or dispositions of concentrated stock positions
- Strategies for extracting liquidity from business
- Interest rate and currency hedging
- Evaluate and recommend the following:
  - i. Property/casualty
  - ii. Excess liability
  - iii. Premature death
  - iv. Disability
  - v. Health

Wealth Transfer

- Facilitate the design of an estate plan
- Coordinate wealth migration
- Manage charitable giving

Special Projects

- Luxury travel
- Total wealth reporting
- Agricultural
- Art, aircraft, nautical, and automotive advisory

Contact Us

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