

Alpha Capital Family Office

We are a multi-generational firm that assists families by creating intentional plans around their life, family, business, community, and wealth.

Here is a listing of some of the services we provide....

Family Board Meetings:

- Build a structure and plan based on the values and what is most important to the family
- Extensive information and data gathering from all family members
- Facilitate quarterly meetings
- Create an education and development plan for coming generations
- Facilitate the creation of the family's purpose, mission, and constitution
- Provide a structure for governance between the family and business
- Facilitate family engagement with business leadership

Business Consulting:

- Review and share overall goals and plan for the business
- Understand all key stake holders in the business, shareholders, voting and non-voting, employees, customers, suppliers, and partners
- Coordinate all key business advisors with family and leadership team
- Share strengths, weaknesses, opportunities, and threats with coming generations to enhance understanding of how the business works and makes money
- Review and educate coming generations on the financials of the business
- Economic and business volatility education
- Build a structure of communication between the family and business leadership
- Review, enhance and share succession plans
- Review strategies with real estate related to the business
- Review exit strategies and the creation of liquidity events
- Provide access to financing sources at various public and private levels

Advisor Team Management:

- Coordination and management of your advisor team to work in a proactive role
- Develop an advisor communication plan
- Insure advisor alignment with family's goals and plans

Digital Organization:

- Provide a digital vault to organize all documents, information and provide coordinated access to advisors that need to be in the know
- Provide a personal financial website to access all your assets in one place
- Provide a wealth planning timeline to keep your top priorities in front of your advisors for proactive focus and completion
- Provide a tax planning worksheet for a single place of proactive planning

Asset Management and Planning:

- Cash flow management now and in the future
- Tax mitigation now and in the future
- Asset protection from unforeseen liabilities
- Family and charitable gifting plans
- Investment management of all asset types inside and outside of your investment management resources
- Review, planning, and tax mitigation for retirement, taxable and tax-free investments
- Access to private real estate and equity opportunities

Estate Planning:

- Creation and customization of your plan to provide for your family and heirs
- Review of documents in place and review of strategy in line with goals and plans
- Utilization of marketability discounts
- Tax mitigation currently and for subsequent generations
- Coordinate with business succession or exit plans
- Coordination with subsequent and prior generations
- Development of a plan to share the necessary points of the planning with subsequent generations

Risk Management and Asset Protection:

- Review of risk management processes and procedures for the family and their assets, look at opportunities to enhance
- Review and adjust asset titling for maximum protection
- Review and recommend on all insurance coverages, property and casualty for the business and personal side, life insurance for the business and personal side, health care now and in the future
- Review original intent and strategy still in line with goals and objectives of the family and the business
- Institute annual review of all insurance coverage, pricing on a proactive basis

Charitable Planning:

- Based on the families' values and goals development of a multi-generational plan to support those organizations that are in alignment
- Review and implementation of various strategies from Donor Advised Funds to Private Foundations
- Extensive time with subsequent generations to determine overlap and differences in organizations to support