Our Consulting and Investment Banking activities are collaborative by nature, as we work in concert with our clients' "trusted advisors". Multi-generational family owned companies are complex, multifaceted, and emotionally charged, and a coordinated effort is essential with advisory teams from the technical disciplines (legal, accounting, risk management, and wealth management) as well as from the family dynamics realm (governance, communication, family mission and legacy, succession planning and conflict resolution).

We regularly team up with a client's incumbent advisors, as well as with best-in-class collaboration partners and consultants, to provide a more holistic range of solutions in order to better balance the needs of the business with the goals and objectives of the shareholders.