



Wealth Services

PeachCap is unlike other wealth management firms. Our team of tax, wealth, and accounting experts work diligently with clients to construct wealth strategies for their financial future. We bring unique investment opportunities to the table, diversifying and optimizing investment strategies for the short and long term. To accomplish this, we offer our clients the following wealth management services:



ASSET MANAGEMENT

We'll work with you to review your full financial picture and provide personalized guidance based on your current portfolio, financial health, and risk tolerance. Let our team identify where to put your capital to make your money work best for you.



RETIREMENT PLANNING

To prepare for retirement, you need to consider mindfully saving into a variety of dedicated retirement accounts. Let us help you make smart savings decisions now so you can enjoy financial independence in the future. We'll identify and examine assets, liabilities, retirement benefits, and cash flow to create a plan that maximizes and preserves savings. A well designed financial planning strategy seeks to support your lifestyle well into your retirement years.



RISK MANAGEMENT/INSURANCE

No one likes to think that a premature death or disability could affect them, but it's better to be prepared just in case. We'll work with you to structure insurance coverage so your family has access to assets and income in the event that a hardship puts your finances in jeopardy. We can find the right life, disability, long term care, or hybrid insurance plan that will protect yourself and your loved ones in case of an unforeseen event.



EMPLOYEE BENEFITS AND COMPENSATION

Whether you are an employee or business owner, PeachCap can advise you on maximizing or structuring employee benefits and compensation. We educate our clients on their current benefits and how they can prepare for their financial future with employer-sponsored plans or stock options. We'll provide advice on how to navigate employer benefits and compensation so that they can work in your favor.



PORTFOLIO ANALYSIS AND ALLOCATION CONSTRUCTION

Leveraging industry tools to model and forecast different portfolio outcomes, we can help you understand when, how, and where to invest your capital to have a well-rounded portfolio that aligns with your financial and life objectives.



EDUCATION PLANNING

Start saving and planning for your child's education. Our team can help you understand and examine the costs associated with primary and secondary education. We can advise you on the most impactful and tax-efficient investment vehicles to help your family meet your education savings goals.

550 Pharr Road NE, Suite 700 | Atlanta, GA 30305 | 404.220.8958 | [PeachCap.com](https://www.peachcap.com)

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SPECIALTY WEALTH SERVICES



ALTERNATIVES AND PRIVATE EQUITY

We offer unique investment opportunities not available through other wealth management firms. Our direct access to private equity, non-traded real estate offerings, and debt deals empower you to branch out from traditional investments and diversify your portfolio.



ESTATE AND TRUST PLANNING

Creating a will is only a part of estate planning. A fully-fledged estate plan will be an ongoing process that will include all of the details for how your assets are to be distributed to your beneficiaries. It assigns rightful heirs for all valuables, identifies guardians for younger children, and includes details for any life or disability insurance policies to provide for your family. It also helps to minimize taxes, court costs, and other fees that could be burdensome to your beneficiaries.



SECURITIES BACKED LENDING

If you're looking for alternate ways to access capital, securities-backed lending might be for you. Your PeachCap team will explain the process of borrowing against securities and show you the advantages compared to traditional loans. When your existing securities are managed by the PeachCap team, we can guide you on how and when a securities-backed loan is appropriate.



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