ONE SEVEN

CAPITAL

Overview

We provide our clients an unparalleled level of service within a broad spectrum of private wealth management products.

We partner with Ultra-High-Net-Worth, Single Family / Multi-Family Offices and Institutions to deliver diverse and exceptional portfolio returns.

Core Offering

Our Relationship – We believe a key role as representative is to provide insights and education to current and future generations. Our priority is creating and achieving short-term and long-term investment objectives.

Portfolio Oversight – Managing a diverse investment portfolio is a full-time job. We provide a clear, concise and transparent process to evaluate your investments.
We specialize in the following:
- Valuation, risk adjusted returns and diversification
- Customized dashboard tools and summaries to simplify engagement
- Shareholder representation

Accounting Advisory – We provide C-Suite level support for any needs in your business portfolio with a focus on:
- Maximizing profits for existing operating assets
- Development of policies and procedures and audit preparation
- Business and personal financial reporting

Tax Planning and Structuring – Our tax planning incorporates your global financial position ensuring a clear and efficient tax structure.

Alternative Investments – We can assist or lead in the analysis and investment due diligence of a direct asset acquisition.