

HIGH COMMITMENT TO CLIENTS' NEEDS DELIVERS RESULTS

Jared Feldman, Anchin Private Client Leader, talks to *Family Wealth Report* about how the firm has put a dent in the wealth sector universe.



How have your colleagues contributed towards the success of your organization?



One thing we have learned over our 100-year history is that you cannot be successful without great clients and a quality team. Our ultra-high-net-worth client base requires an accessible, committed team that promptly and proactively addresses items of importance, and consistently adds value on all types of issues.

To achieve this, each client is paired with a uniquely qualified team with a variety of relevant specialties, leveraging the collective talent of our firm. Our team's constant cultivation of knowledge, and dedication to anticipating our clients' needs are key components of our client service offering.

As the world has become more complex, our team has become more specialized so that we can add value across the broad spectrum of tax, accounting and business issues that our clients face.

What are you going to do to stay on the front foot in a fast growing but also challenging region such as this?

One of the most exciting parts about advising ultra-high-net worth-clients is that they are often ahead of the curve in areas such as investment, art, travel and planning. The dynamic nature of our clients and their ever-changing interests provide us with a road map for upcoming trends.

For example, in 2010, when a client asked us for guidance related to the tax treatment of bitcoin, it became something we were working with years before it moved to the front pages where it is today.

By constantly educating our team about the intricacies of different types of assets such as art, private travel, collectibles and

cybersecurity, we are able to add value in this evolving market. While staying current with complex strategies, we also prioritize streamlining information and simplifying our clients' financial lives with our family office "personal CFO" services.

Whom do you look to for inspiration and ideas?

When putting together a motivated team to generate the idea flow required to support ultra-high-net-worth families, we are fortunate to be able to leverage the talent of Anchin's other industry groups in addition to our clients' other trusted advisors, who work alongside us.

In serving our clients, we have learned that the best way to achieve success is to focus on collaboration with all professionals on matters related to our clients.

By doing this, we learn from each other and inspire each other to solve problems, advance new ideas, and ultimately, add more value to our clients.

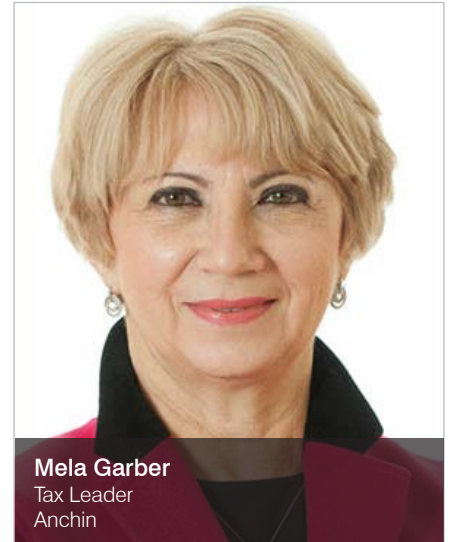
What do you envision for the future of Anchin Private Client?

We have built the Anchin Private Client business into the largest at our firm. We envision a steady expansion of service offerings, aligning with the growth of our team and the continuing education and investment in our personnel.

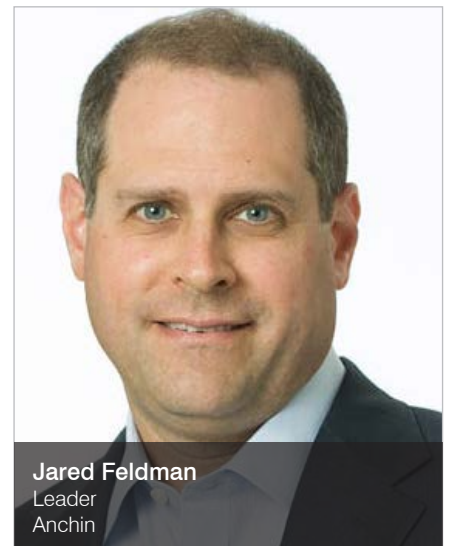
We will keep improving our culture, ensuring that our team has an enriching and fulfilling environment in which to grow, and the resulting continuity helps us better serve our clients.

Fortunately, our firm is led by a forward-looking management committee that has provided the right technology and support needed to grow at the pace we have achieved.

This growth has allowed our team to move to a more specialized skill set that gives us the ability to add value while being nimble, evolving as the needs of the ultra-high-net-worth community change. ■



Mela Garber
Tax Leader
Anchin



Jared Feldman
Leader
Anchin

