

It Takes a Team



“Talent wins games, but teamwork and intelligence win championships.”

—Michael Jordan

Wealth is about more than money. It represents past accomplishments, hard work, and success. It helps you achieve your future dreams, whether you wish to leave a lasting family legacy, fulfill cherished philanthropic goals, or other objectives. Your wealth goals are unique to you, and the bottom line is that you want every aspect of your wealth to be well-cared for, including:

- **Day-to-day cash flow needs**
- **Wealth planning**
- **Investment management**
- **Trust and estate considerations**
- **General questions and service**

At Klingenstein Fields Wealth Advisors (KFWA), we believe a coordinated team of talented specialists is the key to serving as an effective long-term steward for your wealth. Your primary relationship contact serves as your quarterback, working with investment, planning, operations, and service professionals to address your comprehensive wealth needs. In addition, you have access to all the expert resources of KFWA whenever you need it.

KFWA encourages you to get to know all the members of your team. To learn more about how your KFWA team can help you and your family address all of your wealth management needs, please contact us at 212.492.7000 or email us at info@klingenstein.com.

Important Disclosures

Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by Klingenstein Fields Wealth Advisors (“KFWA”)), or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. KFWA is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice. If you are a KFWA client, please remember that it remains your responsibility to advise KFWA, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. A copy of our current written disclosure statement discussing our advisory services and fees is available upon request or by clicking [here](#). Please read the expanded disclosure in the [linked report](#) or by visiting our website at www.klingenstein.com.