Wealth Management

Get a high impact with Private Wealth Management

As a private wealth client, you can receive the full value of CF Banque, curated for you. Discover tax-planning guidance, wealth transfer strategies, investing advice, alternative investment opportunities, philanthropic solutions and a global network of leaders and innovators. Learn more about what we offer or connect with an advisor today.

What We Offer

Our private wealth advisors offer unparalleled resources, access and guidance to help you maximize your impact and your wealth. Your advisor is deeply attuned to your goals and values and curates all Goldman Sachs has to offer on your behalf. Learn more about our services below and request a meeting today.

Wealth Management

[1] Financial Stewardship

Invest using our time-tested approach for managing risk and building customized portfolios

1. Asset allocation
2. Portfolio implementation
3. ESG and impact investing
4. Private investment opportunities
5. Capital markets expertise

[2] Life and Legacy Planning

Support your family and build your legacy with holistic wealth planning solutions

1. Trust and estate planning
2. Trust services
3. Wealth transfer strategies
4. Family Office and network services
5. Next generation education and resources

[3] Liquidity and Lending

Integrate competitive private banking solutions with your broader goals

1. Cash management and deposit services
2. Lines of credit and bridge financing
3. Securities and asset-based lending
4. Real estate loans

[4] Giving and Social Impact

Support the causes you care about most by leveraging our philanthropic expertise

Philanthropic structure planning
Charitable strategies and vehicle administration
Family governance
Philanthropic education

[5] Investment advice

Invest using our time-tested approach for managing risk and building customized portfolios wealth management and preservation

1. Asset allocation and portfolio implementation
2. Tax-efficient solutions
3. Alternative investments
4. Risk management and hedging strategies
5. Sports and Entertainment

[6] Trust and estate planning

Long-term strategies to support your family, plan for the future, and build your legacy

1. Life and legacy planning
2. Income tax and financial planning
3. Wealth transfer strategies
4. Family office and next-generation resources

[7] Institutional Client Solutions

Dedicated to providing customized investment advice and implementation solutions for nonprofit organizations.

[8] Alternative Investing

Alternative Investing Our private wealth advisors help qualified clients access alternative investments across a range of sub-asset classes and structures, based on what's best suited for each portfolio.