Bacciardi Partners



Our services in

Private Wealth

Every wealth story has a past and a future to shape.

Whether built through business ownership, investments, inheritance or a liquidity event, wealth requires a comprehensive approach. Wealth protection, taxation, asset allocation and succession planning must form part of a coherent strategy.

Bacciardi Partners works alongside **individuals, families and entrepreneurs** through an integrated Private Wealth approach that brings together wealth advisory, legal and tax expertise.

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Private Wealth & Estate Planning

Wealth is often built over time through a series of decisions made at different stages of life and business: investments acquired for different purposes, ownership structures created over the years, and tax implications assessed separately rather than as part of an integrated strategy. Effective wealth planning requires aligning these decisions with the individual's personal and family objectives, preserving wealth across generations, and ensuring that asset ownership structures remain appropriate as circumstances evolve.

Bacciardi Partners provides comprehensive advice on the organization, protection, and long-term preservation of private wealth. We assist clients in analyzing the overall composition of their assets, designing appropriate ownership and protection structures, and implementing tailored planning strategies that evolve alongside the client's needs and family objectives.



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Our services

Integrated Wealth Advisory & Wealth Mapping

We conduct a comprehensive review of a client's wealth, analyzing asset composition, ownership structures, concentration risks, liquidity profiles, and investment horizons. Working closely with the client, we identify priorities and long-term objectives, coordinate the necessary professional expertise, and serve as a trusted advisor for ongoing wealth planning and strategic decision-making.

Wealth Structuring & Asset Protection

Based on a thorough assessment of the client's wealth and objectives, we review ownership arrangements and the tax profile of individual assets. We design and implement appropriate wealth-holding and asset protection structures tailored to the needs of the client and their family. These may include holding companies, family investment vehicles, simple partnerships, trusts, and other planning structures aimed at preserving and protecting wealth across generations.

Private Wealth Tax Planning

Tax considerations play a critical role in the effectiveness of wealth planning strategies, influencing the timing, structure, and overall efficiency of transactions and wealth transfers. Cross-border investments, internationally located assets, and international residence create additional layers of complexity that require coordinated planning. We advise clients on the tax implications of wealth restructurings, gifts, estate transfers, succession planning, and reinvestment strategies, developing solutions that align tax efficiency with the client's personal, family, and long-term wealth preservation objectives.

Wealth Transition & Capital Deployment

Wealth evolves. The sale of a business, the disposition of a significant asset, an inheritance, or another major liquidity event can fundamentally reshape an individual's asset base, risk profile, and long-term objectives.

Navigating this transition requires a coordinated approach that addresses the financial, tax, legal, and strategic implications of the event while establishing a clear framework for capital preservation, allocation, and reinvestment.

Bacciardi Partners advises individuals, families, and entrepreneurs throughout every stage of a wealth transition, from managing the liquidity event itself to designing and implementing the next phase of their wealth strategy.



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Liquidity Events & Wealth Transition

A liquidity event, whether resulting from the sale of a business, the disposition of a significant asset, an inheritance, or a major divestment, can dramatically alter the structure of an individual's wealth and create the need for timely and strategic decision-making.

We advise clients both before and after the event, coordinating the financial, ownership, tax, and governance implications while helping establish priorities for wealth preservation, capital allocation, and future investment strategies. Where appropriate, we integrate our Private Wealth capabilities with the firm's Legal & Tax, Strategic Advisory, M&A, and Special Situations practices to deliver a comprehensive and coordinated response to complex transition scenarios.

Capital Allocation & Financial Wealth Advisory

Following a liquidity event or significant wealth restructuring, available capital should be deployed through an investment strategy aligned with the client's objectives, risk tolerance, liquidity needs, and investment horizon.

We assist clients in defining capital allocation priorities within the context of their broader wealth strategy, helping them evaluate investment opportunities and determine the most effective use of capital. When capital is allocated to new business ventures, strategic investments, or real estate projects, we integrate the capabilities of our Strategic Advisory team to support opportunity assessment, transaction structuring, execution, and long-term value creation.

Thank you for your attention

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