



The Abernathy Group II

Family Office



**623 Fifth Avenue 28 Floor
New York, NY 10022**

**Phone Number: 212-293-3499
Fax: 212-785-0495**



The Abernathy Group II
Family Office

OVER 20 YEARS WE HAVE BEEN SERVING THE FINANCIAL NEEDS OF PHYSICIANS AND SURGEONS

OUR STORY

The Abernathy Group II Family Office is significantly different from other firms calling themselves financial advisors. We know the most successful family's in the world protect and manage their financial and human capital as if it were a business.

This means turning each unique Family Unit into a Family Enterprise. The Family Enterprise is organized and its decisions are well researched and logical. The most triumphant families combine their financial capital with their human capital to make educated and sensible legal and financial decisions.

The most thriving Family Enterprises manage with the same proficiency as a corporation's assets so family's decision makers spend less time on important decisions and have better outcomes. **The Abernathy Group II Family Office** simplifies each family's personal financial affairs by delivering important, objective information quickly, making critical legal and financial decisions effortless.

Only the best professional investors and financial analysts comprise the **Abernathy Group II Family Office**. We are exactly the opposite from the brokerage community in that we have no conflicts of interest; we have no vested interest in selling products, and work directly for each family.

We realize each family is distinct in its access to capital, and is equally distinct in its access to human capital. We appreciate each family has deep expertise in the companies they own and run, yet has little time to keep up with the increasingly complex, and increasingly global world of personal finance. We understand there is scant time to focus on your business and spend the incredibly important time with your family.

Contact us with any questions, comments, or to review your portfolio today.



The Abernathy Group II

Family Office

OUR SERVICES

A Family Enterprise combines a family's human, intellectual and monetary capital to create an operational structure that produces and preserves multi-generational wealth. By conceptualizing one's assets as an enterprise, families begin to understand the power their resources can have in shaping their lifestyle, the personal development of their heirs, and their community at large.

Unlike traditional wealth management organizations, where advisors are legally obligated to provide advice that is in the best interest of their employer, a Family Enterprise has employees who work for the family. Their obligation is to provide intelligent advice and offer objective information which enables the family's decision-makers to make well-informed decisions that are consistent with the best interests of the Family. When a Family Enterprise is structured correctly, it acts as glue for creating lasting, generational wealth, perpetuating the family name and its unity.

Please select from the following service categories for a detailed list of services offered by The Abernathy Group II Family Office.

- ▣ **Asset Management Services**
- ▣ **Asset Protection Services**
- ▣ **Estate Planning Services**
- ▣ **Financial Planning Services**
- ▣ **Accounting and Tax Related Services**
- ▣ **Banking Services**
- ▣ **Real Estate Services**
- ▣ **Concierge Services**

Contact us at (212) 293-3456 with any questions, comments, or to learn more about our family office services today.