Wealth Management for the Newly Promoted PwC Partner

Chicago Partners Specialized Strategies for PwC Professionals

CHICAGO PARTNERS | WEALTH ADVISORS

Background on Chicago Partners

In 2007, founders Jim Hagedorn and Anthony Halpin launched Chicago Partners, spinning off PricewaterhouseCoopers' (PwC) wealth management arm into a small, Chicago-based RIA.

As of today, Chicago Partners manages over $8.45B in AUM and operates as a CIO and trusted advisor for over 2,900 investors across the United States and abroad.

About Chicago Partners & Our PwC Relationships

200
Current PwC Partner Clients

120
Current PwC Staff Clients

115
Retired PwC Partner Clients

$1.25B
Assets Managed for PwC Relationships

25
States with PwC Partner Clients

The Do's

Key Habits for Newly Promoted PwC Partners

The Do's for Newly Promoted PwC Partners

Partnership Management

- Partner Affairs — main point of contact
- Pay attention to Firm Risk vs. Non-Firm Risk
- Understand independence restrictions for family members and children

Investment Management

- Post-tax 401(k) contributions – Auto Roth Conversion
- Make annual backdoor Roth contributions (different than post-tax 401k contributions)

Retirement Planning

- Set retirement fund allocation targets on auto-rebalance
- Consider PDP as part of fixed income allocation

Financial Planning

- Build a long-term cash flow plan with annual savings targets, not spending targets
- Automate monthly savings on auto-pilot
- Prioritize updating or creating an estate plane

The Don’ts

Mistakes to Avoid in Year One and Beyond

The Don'ts for Newly Promoted PwC Partners

1. Make a large, unplanned financial decision in Year One.
2. Forget about investments sold post Independence review.
3. Keep too much cash on hand.
4. Ignore estimated tax payments.
5. Be afraid to invest in equities because of compliance restrictions.
6. Underestimate the long-term nature of your investments.

Chicago Partners Client Advantages

PwC Independence Management

of Checkpoint accounts and security preclearance.

Insights and Applications

on Volatility Tax, Patient Capital, and Inflation.

Truly Customized Solution

tailored to your unique financial objectives.

Access Institutional Vehicles

that allow you to diversify your portfolio.

Relentless Pursuit of Ideas & Strategies

to help your capital compound.

Holistic Balance Sheet Management

offering comprehensive support.

Why PwC Partners Choose Chicago Partners

Independence Expertise

Deep Knowledge of PwC Restrictions
Compliance-Aware Portfolios

Tax Strategy Focus

The Tax-Aware Fund, Diversified Equity Fund (DEF), and Diversified Income Fund (DIF)

Long-Term Planning

Cash Flow & Savings Targets
Retirement & Estate Plans

Dedicated PwC Service

Compliance management through the Automated Investment Reporting (AIR) system

Questions?

You can visit https://chicagopartnersllc.com/air/ for more information or to set up an introductory call.

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