



Palisades Hudson Financial Group LLC

COMPREHENSIVE, OBJECTIVE, FEE-ONLY ADVICE AND SOLUTIONS

We strive to provide impartial information and advice that promotes our clients' financial security, the well-being of their loved ones, the satisfaction of their legal obligations, and the achievement of their philanthropic goals.

At A Glance

- Palisades Hudson provides financial planning services to professionals, athletes, entertainers, senior corporate executives, closely held businesses and high-net-worth families across the United States and abroad.
- Assets under management: over \$1.8 billion
- Total client relationships: approximately 240
- Number of employees: 23
- Certified Financial Planners™: 9
- Certified Public Accountants: 3
- Enrolled Agents: 4

Why Palisades Hudson?

- Holistic approach that takes into account a full range of financial issues
- Objective, unbiased advice
- Personalized attention and customized solutions
- Lasting relationships between advisers and clients
- Fair and transparent fee schedule provided in advance
- Compensated solely by clients
- Knowledgeable and accessible staff
- Access to institutional-quality investment managers

Background

- Founded in 1992 by Larry Elkin
- Registered investment advisor affiliate, Palisades Hudson Asset Management, launched in 1997
- Entertainment and sports business management practice launched in 2016
- Fort Lauderdale office established in 2005
- Georgia office opened in 2008
- Oregon office opened in 2012
- Texas office opened in 2015
- Miami office opened in 2019

Core Capabilities

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| • Asset allocation | • Tax planning and preparation |
| • Investment management | • Cross-border tax planning |
| • Estate planning | • Bookkeeping and bill pay |
| • Retirement planning | • 401(k) advisory services |
| • Insurance consulting | • Business entity structuring |
| • Executive financial planning | • Royalty administration |
| • Business valuation | • Business management for athletes and entertainers |
| • Financial reporting | |
| • Trust planning | |

GET IN TOUCH

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Stamford, CT

Atlanta, GA
Hillsboro, OR

Austin, TX
Miami, FL