

# Cherry, Bekaert & Holland Collaborative Solutions Group

## CB&H WEALTH MANAGEMENT SERVICES

**Mission:** To serve those who desire to use their wealth to have a significant, positive and lasting impact on their families, their employees and their communities.

**Vision:** To provide a highly-skilled, independent team of wealth management experts that offer objective, transparent and compassionate advice to our clients to ensure excellent stewardship of their most valuable assets – all under one umbrella, not one roof.

If you would like to schedule a meeting with a CB&H Family/Business Wealth Coach, please contact Mark Maund, Principal, at 800-277-0070 or email [mmaund@cbhwealth.com](mailto:mmaund@cbhwealth.com)

[www.cbhwealth.com](http://www.cbhwealth.com)

Successful families and businesses have a myriad of wealth management decisions to resolve. Typically, the solution is to either personally manage this complicated process, or to entrust it to a large institution. Because your unique needs warrant a unique solution, CB&H Wealth Management Services (CB&H) has formed the Collaborative Solutions Group (CSG). We provide the convenience of a family/business wealth coach, using the best specialists available.

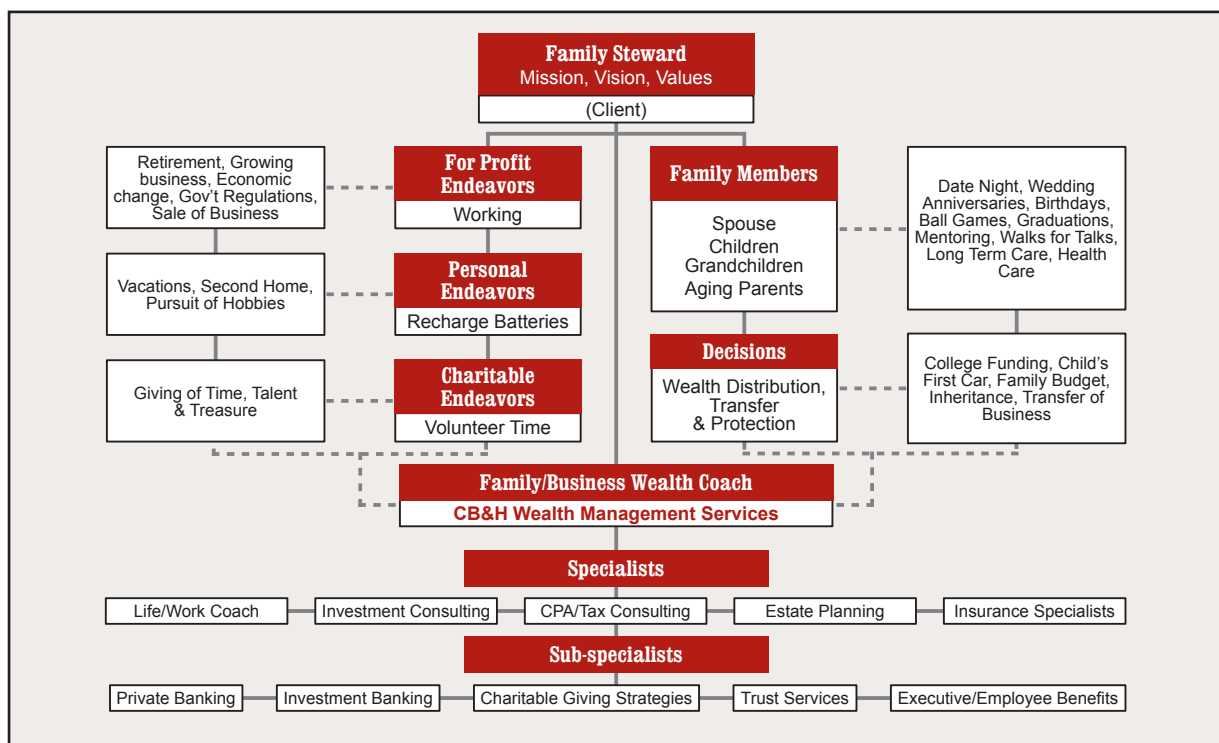
Your CB&H Family/Business Wealth Coach hand-selects a team dedicated to ensuring that your mission, vision and values are realized and never compromised. Our due diligence process provides transparent and ongoing monitoring of the effectiveness of both your wealth management plan, and each team member.

CSG is comprised of CB&H's wealth management team, nationally-recognized investment consultants, estate planning experts/tax attorneys, insurance professionals, a life/work coach, trust companies, investment banking firms, private banking firms, charitable giving professionals, and executive/employee benefits firms.

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## Wealth Management Snapshot

CB&H Wealth Management Services' Collaborative Solutions Group



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