



Richard W. Gayton



# Lakeside VIRTUAL FAMILY OFFICE, LLC

RICHARD W. GAYTON, *CEO & Founder*

***“At LVFO, We Protect and Preserve Family Wealth”***

LAKESIDE VIRTUAL FAMILY OFFICE, LLC (LVFO) is an investment practice comprised of a virtual team of prominent and experienced advisors who coordinate private wealth management, estate planning, and succession plans for a select clientele of ultra-high net worth individuals and families. Similar to a financial concierge service, LVFO bundles many valuable services under the same roof to provide the expertise and availability of an ensemble of advisors to accommodate its clients' various needs.

RICHARD W. GAYTON, *CEO & Founder* of LAKESIDE VIRTUAL FAMILY OFFICE, has spent nearly 30 years working on Wall Street providing financial advice and seeking both traditional and alternative investment strategies for high net worth clients. Mr. Gayton received a *Series 7* license in 1985 followed by a *Series 66* license, which has allowed him to manage funds on a discretionary basis for a wide range of clients. His flexibility and problem-solving skills are responsible for finding uncommon profits in common places.

- As CEO and Founder of Lakeside Virtual Family Office, Mr. Gayton is actively engaged in planning and protecting high net worth individuals' and families' strategic objectives.
- At UBS, Richard was the Senior Portfolio Manager of the Private Asset Management (PAM) with about \$300 million assets under management.
- At Oppenheimer & Co. Inc., Richard utilized one of the few Section 1256 manager's in the country to operate a strictly market neutral strategy.
- At Merrill Lynch, Richard became one of the first retail stockbroker's in the 1980s to be authorized to engage in Cross Currency Financing for NRAs.

Rick earned his Bachelor's degree from the University of California, Berkeley. He has served as a member of the Los Angeles Committee on Foreign Relations and as a board member of Leadership, Southern California, as well as on the boards of the Salvation Army and the Food Bank of Southern California.

## Features and Benefits of Lakeside Virtual Family Office

Its advisors are all prominent and experienced in their areas of expertise, having served similar clientele in outside firms.

- Its virtual team of advisors is linked to experts who can provide additional needed services from Europe, China and India.
- By leveraging a team of virtual advisors, LVFO has the ability to offer expanded resources that other Family Groups may lack.

In addition to offering greater affordability, LVFO's focus is on working with a limited number of clients so that it may provide more focused attention to its clients' financial and personal needs for their business, trust, family, or retirement pension.

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## Clients

LAKESIDE VIRTUAL FAMILY OFFICE services a select clientele with a minimum account size in excess of \$25 million. LVFO's cross-section of clients includes:

- **High net worth individuals or families referred by their CPAs**
- **CEOs representing pension funds**
- **Non-profit foundations looking for a preferred rate of return**
- **Recipients of a windfall, inheritance or the sale of a business**

For each of its valued clients, LVFO coordinates and oversees the handling of a variety of valuable, inter-related private wealth management services which may include estate planning, succession plans and best practices.

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## Providing Balance for a Family's Financial Objectives— Personal, Material, Business

At LAKESIDE VIRTUAL FAMILY OFFICE, the goal is to discover what clients need before they know they need it—and the clients' interests and needs always come first. LVFO puts an experienced team out in front to seek out tax advantages, private wealth management, and alternative investments. Its focus is on providing less correlation, more alpha, and a personal touch. Most importantly, LVFO helps each client create their own Mission Statement, a non-monetary guideline which identifies family values and bonds the family together.

By having all its advisors working together as a team, they are able to share information with one another as they analyze and plan how to achieve the best possible outcome for clients' financial and life objectives. Serving in a non-biased advisory capacity to family group members, LAKESIDE VIRTUAL FAMILY OFFICE is able to provide improved communication and resolution to conflicts when they arise between family members. The end result is more positive, harmonious relations between generations and the preservation and protection of families' legacy and wealth.

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## Services of Lakeside Virtual Family Office

LVFO's advisors determine the best overall strategy to meet the needs of its clients, putting into place and managing a comprehensive plan that grows and adapts with the family.

LAKESIDE VIRTUAL FAMILY OFFICE's tactical and strategic services are as follows:

- **Private Wealth Management**
- **Portfolio Management**
- **Strategic Tax Planning— managing stocks, bonds, mutual funds, Hedge funds, buildings, privately-owned family businesses, etc.**
- **Life Insurance**
- **Philanthropic Activities & Charitable Giving**
- **Accounting & Bill Pay**
- **Estate Planning—Trusts, Wills & Estates**
- **Succession Planning**
- **Mergers & Acquisitions**
- **Sale of Businesses**

A percentage of the ultra-wealthy do not take full advantage of these services. With LVFO's holistic approach, directed and overseen by a team of experienced advisors, all of a family's objectives can be met or exceeded, and their wealth, protected and preserved.



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