

Leverage Your Clients' Art & Collectibles as a Wealth Strategy Tool



Collector^{*IQ*}

Professional Edition

for Family Offices

Wealthy clients are increasingly calling on the family offices they've established or hired to deliver a wider variety of services.

Gone are the days when family offices were limited to wealth transfer and asset consolidation services or to providing guidance during sudden influxes of liquidity. There's much more at stake today for family offices, which are taking on more dynamic functions such as investing in companies and real estate. It's not hard to see why. Family offices now manage an estimated \$4 trillion globally, according to London researcher Campden Wealth, and their clients expect them to find ways to both protect and build their fortunes.

Perhaps one of the most overlooked aspects of managing such wealth, however, is maximizing the value of clients' non-financial assets—investments in fine art, wine collections or classic cars, to name a few. How a family office insures such investments, mitigates risk and offers a path to liquidity could mean the difference between fully leveraging clients' assets and leaving a lot of money on the table.

CollectorIQ's data-driven platform enables real-time valuation, tracking and management of non-financial assets, enabling wealth managers, family offices and private collectors to aggressively maximize liquidity for fine art and collectibles. The software-as-a-service allows family offices to focus the same type of quantitative lens on non-financial assets—which might be 15 to 20% of a client's overall wealth—that they use to manage clients' stocks and bonds. Think of CollectorIQ as sort of like a Bloomberg Terminal for art and collectibles. Here's how it works:



A “fine” mess.

There's a good reason non-financial assets—art collections, in particular—have traditionally been under-leveraged: their value isn't always easy to quantify. Management of fine art properties is particularly difficult because there are limited ways to assess value and few tools available to automate the process. Such opacity leads to very low levels of liquidity for these possessions related to their value.



A valuable tool.

CollectorIQ delivers the transparency that family offices and their clients are looking for. Tens of millions of searchable data points offer wealth managers the most accurate view into art value based on comparable works. Track trends, view performance, manage concentration, monitor comparable sell-throughs and knowing the current value means there is “always on” risk analysis. Best of all, this information can quickly and easily be shared with clients.



Access anywhere.

CollectorIQ's software is available via a desktop or mobile app and can provide family offices, their clients and any other stakeholders with insights into the value of their assets as well as global market trends. Users can also access specific documentation—invoices, insurance forms and appraisals—from any iOS device.



A secure solution.

Family offices can reassure their clients that information uploaded to CollectorIQ will be protected by bank-level security and tiered permissions. CollectorIQ provides its users with password-protected access to a dashboard accessible from a desktop or iOS mobile device.



A conversation starter.

Clients will appreciate having up-to-date alerts sent to them about changes in the value of their art collections. Family offices can add a personal touch by sending monthly or quarterly reports and contacting clients directly to discuss strategies to address changing market conditions.

Bottom line.

Family offices need to take a holistic approach—to meet their clients' needs as well as grow their clientele—and that means optimizing the value of non-financial assets. Working with CollectorIQ, family offices will also have the resources to deliver a number of related offerings, including onsite archiving and registrar services, IRS-qualified appraisals, Qualified intermediary tax consulting and expert consultation on tax-advantaged donations. A higher level of organization and more tools at their disposal means family offices can also plan for long-term expansion as wealthy families in Latin America, Asia and the Middle East look to set up family offices with outposts in the U.S. and Europe.

Learn more. Contact us.

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