



PLANNING & EQUITABLE DISTRIBUTION APPRAISALS

TRANSPARENCY, INDEPENDENCE & TRUST

The Fine Art Group

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Tangible assets, like fine art, furniture, decorative arts, coins, jewelry, textiles and rare cars are now widely recognized as an asset class in their own right. These items need to be managed as repositories of significant monetary value with proper collection management, and with the same care as financial assets are managed.

Part of estate planning should include a review of the values on existing appraisals and updating appraisals for new acquisitions. Based on fair market value (FMV), our appraisals for estates and planning take into consideration all aspects of the client's portfolio and their long-term goals for the collection. Working with our clients, their families and their financial advisor, our appraisals are customized to continue the legacy of the family and collection.

Included In Planning & Equitable Distribution Appraisals

- Individual cataloguing, photographs and values for each item identified as over a client-specified threshold
- Digital and hardbound copy of reports
- Comparable sales results and analysis
- Condition reports on items valued over \$100,000 (FMV)
- Organization by giftees and/or dates of gift
- Narrative for items over \$50,000 (FMV) to discuss current market
- Complimentary yearly reviews for price fluctuations

Additional Planning & Equitable Distribution Services

- Collection care and management, including storage, exhibition, shipping, and conservation
- Family organization – establishing items that should be kept within the family, items that can be donated, items that can be sold (either to benefit the family or a charitable organization)
- Determining a timeline for execution of collection



CONTACT

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