



Unlocking the Potential of Hidden Wealth:

Managing Tangible Assets

Presented by Pall Mall Art Advisors

CE Credits: 1.0 for CFP's

Continuing Education Course Overview:

When are valuable objects considered appreciating assets? How does the expanding global art market affect the value of fine art, collector cars, memorabilia, wine, silver, jewelry and other collectibles owned by clients? What factors influence the value of objects? During the past several years, fine art and collectible markets have been in a continuous state of evolution expanding into new countries and to new purchasers across the globe. Due to the increased number of international buyers, tastes and desires have broadened. As a result, the value of fine art, jewelry, vintage cars and collectibles have fluctuated tremendously over the past decade due to changes in consumer demand. Many personal collectors remain unaware of the value changes and as a result, their personal assets are not adequately protected nor managed.

This presentation will educate the wealth community on the state of the art and collectible markets. The wealth community will also develop an understanding of the importance of planning for and insuring a client's valuable tangible assets. The major themes of the course include:

- How the expanding global art market affects the value of tangible assets
- Understanding how value is determined and the appraisal process
- Using Art as Collateral
- IRS guidelines and tax implications for tangible assets
- How to monetize tangible assets and increase assets under management
- Understanding risk management strategies for tangible assets

Who Should Attend: All financial planning and wealth management professionals.
(CE credit for CFP's)

Class time: 1 hour course offering

Presenters: Colleen Boyle, Senior Vice President-Pall Mall Art Advisors, Anita Heriot President-Pall Mall Art Advisors, and Kate Molets-Southeastern Regional Manager-Pall Mall Art Advisors

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