



HIM Service Offerings

The services of Harvey Investment Management, Inc. extend beyond traditional wealth management. We fully coordinate your family's overall financial landscape to help meet your needs and objectives.

Estate & Financial Planning

- Education and retirement planning
- Family gifting
- Generational education programs
- Succession planning

Lending Solutions

- Financing strategies
- Highly competitive lending rates via our custodian
- Referral relationships in place for non-custodian lending solutions

Family Office & Executive Banking

- Bill pay
- Cash management
- Checking accounts
- College funding
- Document management
- Health care and insurance resources
- Investment banking and business valuation services

Investment Management

- Alternative investment solutions
- Asset allocation
- Consolidated reporting
- Customized investment strategies
- Portfolio management
- Risk management
- Tactical deployment

Philanthropic Strategy & Planning

- Charitable planning
- Donor advised funds
- Family foundations

Tax Management

- Estimation of gains and/or losses on taxable accounts
- Estimation of returns for alternative investments
- Proactive harvesting of losses across investments
- Tax summaries, 1099s, and K1s provided to clients and CPAs

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