

# Private Client and Family Office Services



## Why Delphi?

Your needs are unique. Discretion, confidentiality and relationship development are paramount. Delphi understands the needs of private clients and the level of attention they expect. Delphi delivers, combining old style business values with new style business tools to create an environment that private clients appreciate. We use our business acumen to facilitate your success by linking business strategies with your needs. Your continued success is supported by passionate professional service. We have no concept of one size fits all mentality. We will understand your needs and engage with you to ensure we move forward in an agile and constructive fashion.

## Who we are

Delphi was formed in 1997 to provide private equity fund administration, private client administration services, client-directed investment execution and settlement services and alternative investment administration including real estate, hybrid, and hedge funds. Delphi also provides directorship services, General Partner consulting, corporate services, and a full range of related services.

Delphi's management team has many years of experience in our chosen business lines and works closely with clients in order to provide customized solutions. Other qualified team members perform the day-to-day operations using flexible technology tools. Delphi's experienced team recognizes the importance of long term relationships with clients and provides superior service in order to maintain those relationships.

### Sample Services

- Specialist services, uniquely tailored and positioned to your exact needs
- Practical and sensible advice and guidance
- Reporting when and how you want it
- Directorship services, corporate secretarial services, incorporation assistance, meeting support
- Business and strategic planning and modeling services
- Financial planning and management
- Operational improvement advice
- Compliance and risk services
- Referrals to best-of-breed business services: tax, banking, investment, attorneys and other business service providers

*"Our relationship with Delphi began in 1997, during which time we have found them to be both durable and dependable, helping us with innovative solutions to intractable problems. They have been accommodating and flexible when required through the good times and the not so good times! Their independent counsel and clear thinking have helped tremendously."* **Private Client**

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