private wealth

ASSET MANAGEMENT



FOCUSED ON YOUR SUCCESS

We are your FAMILY OFFICE

that's committed to providing expert counsel exclusively to families and institutions.





ABOUT US

The Future of Private Wealth Management

We created Private Wealth Asset Management with a singular focus and mission: to put the client first. As a team, we strive to make managing the complexities and decisions impacting the financial and nonfinancial priorities of high-net-worth families and institutions easier. Our highly credentialed financial professionals build relationships with our clients and bring decades of experience to serve their needs. We approach each of our client relationships individually, getting to know their unique goals and concerns, understanding what is most important to them, and sharing their values.

We know that clients need specialists to respond to the ever-changing and increasingly complex aspects of their lives. It takes a team of experienced advisors to provide proactive, relevant advice to high-net-worth individuals and families. We are proud of our team structure, surrounding the client with professionals who have specialized knowledge from various disciplines. Our advisors help clients navigate the complexities of wealth and legacy planning, pre-transaction business planning, full-balance sheet wealth management, lifestyle and cash flow planning, and philanthropy.

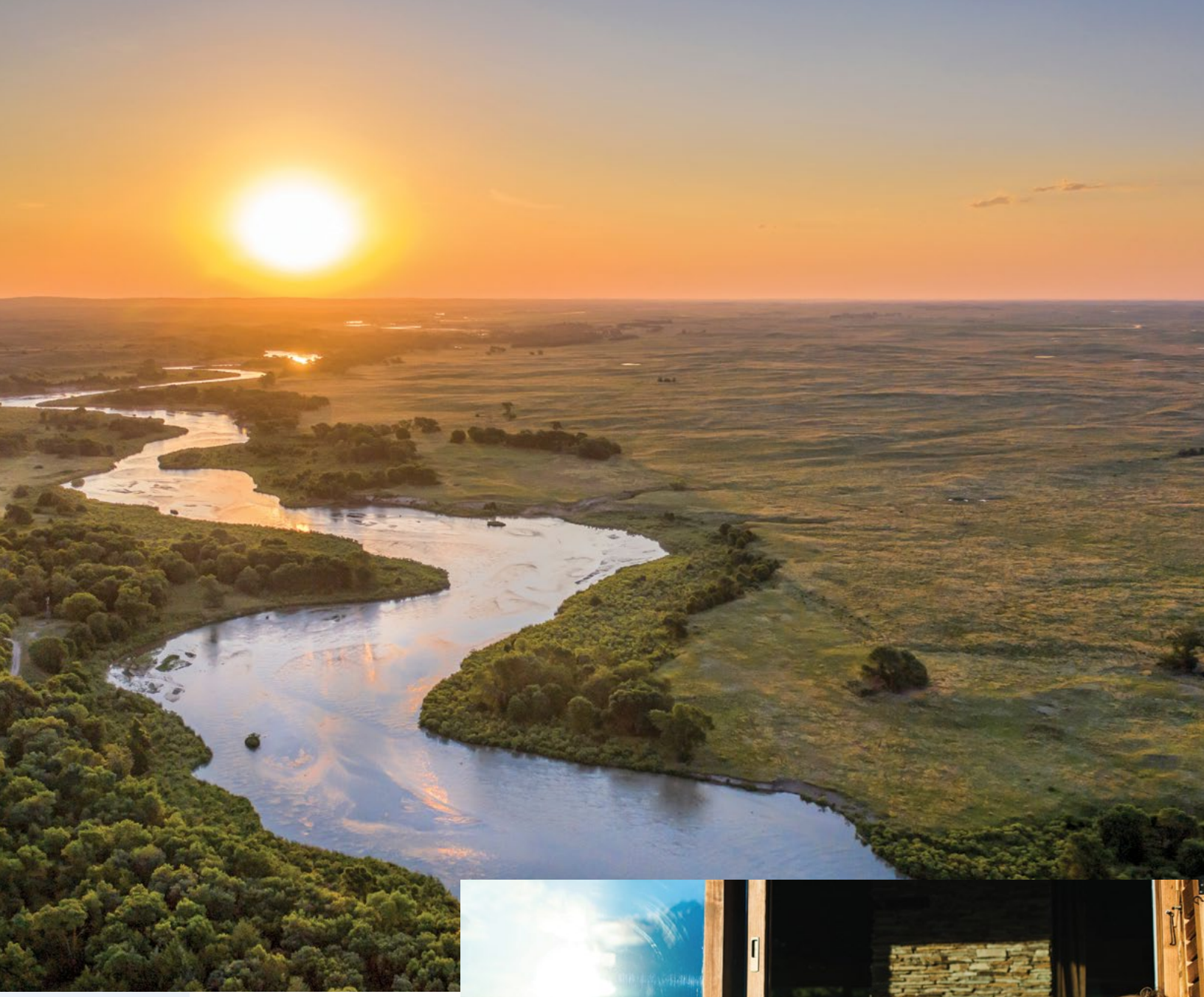
As an independent wealth management firm, we have the flexibility to adapt to the changing needs of clients. We strive to be a proactive partner, working with clients and their other trusted advisors to identify opportunities and risks. We adjust to the changing landscape, whether in the markets or their personal lives.

Our clients value our advice, recommendations, and expertise developed from decades of experience helping similar clients through both routine and complex issues. They want to speak to a person they know, and who knows them personally. Our services are delivered locally, with depth and breadth of experience.

We built Private Wealth with the future in mind. Each experienced advisor is encouraged to plan for their own succession, hiring and mentoring the next generation of professionals to ensure continuity of service to our client relationships.

The Private Wealth team of advisors/ principals has over 500 years of combined experience in wealth management. We will meet you where you are with a team that is in it for the long term. Our company culture is defined by integrity, collaboration, curiosity, fun, community, and putting our clients' interests at the center of all we do.

Investment Advisory Services offered through Private Wealth Asset Management, LLC.





Our Specializations
AND SERVICES

Scope of WORK

Our privately held, independent wealth management and planning consulting firm serves as a multi-family office to successful business owners, families with generational wealth, people with unique or complex financial situations, and wealth creators who are in need of holistic wealth planning.



CUSTOM PORTFOLIO MANAGEMENT



TAX-AWARE INVESTING



LIFESTYLE AND CASH FLOW PLANNING



LEGACY PLANNING AND MULTI-GENERATIONAL WEALTH TRANSFERS



COMPREHENSIVE RISK MANAGEMENT



ESTATE PLANNING



PHILANTHROPY AND GIFTING



BANKING AND LIQUIDITY MANAGEMENT



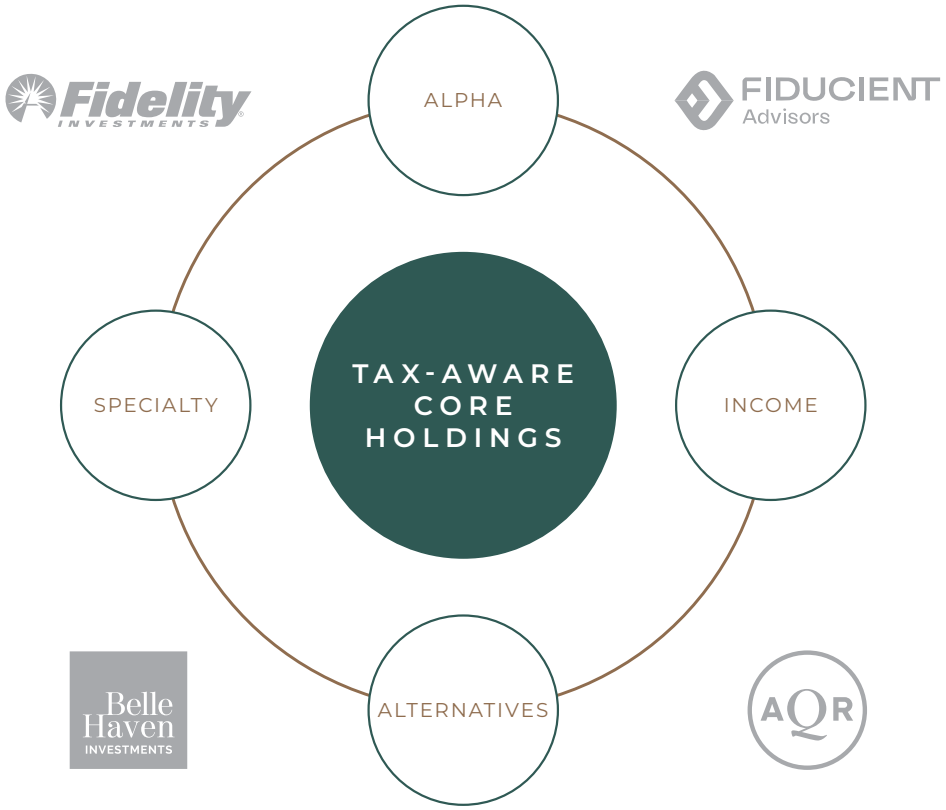
PRE-SALE AND BUSINESS TRANSITION PLANNING

True independence and fiduciary advice serve as the foundation for our body of work, and through this, we help our clients avoid the potential unintended consequences of critical wealth decisions. Navigating the world of financial, legal, tax and risk management is challenging for many families, but we built our firm around being solution-agnostic and bringing the right team to the table when these opportunities arise.

Investment Advisory Services offered through Private Wealth Asset Management, LLC.

Investment Management

PROCESS & STRUCTURE



CORE PORTFOLIO

CORE EQUITY, TAX AWARE AND HEDGED OR UNHEDGED

- Customized Focused Portfolio
- Tax-Aware/Efficient Russell 1000 or 3000 with substantial tax loss harvesting capabilities
- Can also be implemented with mutual funds and exchange-traded funds (ETFs)

CORE BONDS

- Individual bonds where appropriate
- Custom tax approach
- Bond substitutes with similar risk profile and income

SATELLITE PORTFOLIOS

ALPHA

- Concentrated Positions
- Sector Tilts
- Tax-Advantaged

INCOME

- High Dividend
- Preferred Stock, MLPs
- REITs

SPECIALTY

- Dynamic Hedging
- Natural Resource Management
- Pre-IPO

ALTERNATIVES

- Digital Assets
- Private Capital
- Real Assets

Investment Advisory Services offered through Private Wealth Asset Management, LLC.









Meet the TEAM



CONTACT

P | 314-314-6740

M | 314-210-7982

E | tdurbin@privatewealth.com

Timothy Durbin

PARTNER, MANAGING DIRECTOR

As a Partner and Managing Director for Private Wealth's St. Louis office, Tim is responsible for client relationship management and community engagement. He enjoys working with his client families to manage their overall financial plan, save for retirement and pass along money and values to the next generation.

Educated at Saint Louis University, Tim embraced the school's focus on preparing students to make the world a better place. Over the past two decades, Tim has balanced the demands of a professional career journey, fatherhood, and community involvement. His work ethic, client-focused approach, and team-building leadership resulted in roles of ascending responsibility at several large financial institutions before he joined Private Wealth.

Away from work, he has been happily married to his wife, Kelly, since 2001, and they have four incredible children. A former athlete, Tim volunteered as a youth coach for over 15 years and loves watching his kids play sports. He also enjoys reading, writing, songwriting, great podcasts and lifelong learning. His family is complete with two tri-color Collie sisters.

YEARS OF EXPERIENCE

- 24 years

EDUCATIONAL BACKGROUND

- St. Louis University, BA Psychology

COMMUNITY INVOLVEMENT

- Chamber Music Society of St. Louis - Board Chairman
- The Rotary Club of Clayton-Ladue - Secretary, Former President, Three-Time Rotarian of the Year Award Winner
- St. Louis University Finance Department - Advisory Board Member
- Vistage International - Member
- Estate Planning Council of St. Louis - Member
- Market House Theatre - Former Board Member

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



CONTACT

P | 314-314-6739

M | 314-600-1170

E | jsteiner@privatewealth.com

Jeffrey Steiner

PARTNER, SENIOR PORTFOLIO MANAGER

Jeff is a Partner and Senior Portfolio Manager at Private Wealth Asset Management, bringing over 30 years of experience to his role. He is dedicated to helping clients at all stages of life—ranging from seniors to grandchildren—understand their investments and align them with their future plans. Jeffrey frequently collaborates with the Foundations and Endowments team to ensure his clients' goals are met.

In addition to his professional commitments, he serves on the board of directors for the Girl Scouts of Eastern Missouri and is an active member of their finance committee. His background includes three years in the United States Army and five years in the Army Reserves.

Jeff has been married for 27 years and is the proud father of three children.

YEARS OF EXPERIENCE

- 30+ years

EDUCATIONAL BACKGROUND

- University of Illinois, MBA
- Texas A&M University, BA in Finance
- Sauk Valley Junior College, Associate Degree in Engineering

COMMUNITY INVOLVEMENT

- Girl Scouts of Eastern Missouri - Board Member, Finance Committee

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



CONTACT

P | 314-314-6738

E | mandyj@privatewealth.com

Mandy Jones

CLIENT RELATIONSHIP SPECIALIST

As a Client Relationship Specialist, Mandy provides a high level of client services and support, handling information in a secure and discreet manner. Her experience includes a variety of clientele, including business partners, 401(k) and personal financial services.

Having grown up in the St. Louis area, Mandy now lives in St. Peters, Missouri, where she enjoys spending time with her husband of over 20 years and four boys. She and her husband are proud Army and Marine parents. In her free time, Mandy enjoys reading, boating and watching their youngest son play soccer.

YEARS OF EXPERIENCE

- 15 years

COMMUNITY INVOLVEMENT

- Pedal the Cause - Supporter
- Friends of Kids with Cancer - Supporter
- Make a Wish Foundation - Supporter

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



CONTACT

P | 319-308-6612

E | wendyb@privatewealth.com

Wendy Brekken, J.D.

PRESIDENT, CHIEF WEALTH PLANNING OFFICER

As the Chief Wealth Planning Officer, Wendy leads the strategic direction and delivery of comprehensive wealth planning services to high-net-worth individuals and families. She lends her experience and expertise in guiding clients through complex and often emotional decisions, facilitating family meetings, and navigating challenging family dynamics. She has extensive experience in the areas of estate and wealth transfer planning, business succession planning, lifestyle endowment and philanthropy.

As a President and a member of the Executive Committee, she works closely with the rest of the Private Wealth leadership team to set the vision and execute on the strategic direction for the firm. Wendy manages key relationships and initiatives, including partnering with outside counsel on our legal and compliance matters, as well as leading the compensation and human resources committees for Private Wealth.

Wendy serves as a Trustee on the Foundation Board for Metro State University and serves as chair of the Governance Committee. When away from the office, Wendy enjoys spending time with family and friends, reading, traveling, and engaging in outdoor activities (even during Minnesota winters). She and her husband have three children, along with a mini-Australian Labradoodle.

YEARS OF EXPERIENCE

- 20+ years

EDUCATIONAL BACKGROUND

- Creighton University, Heider School of Business, Graduate Certificate, Financial Psychology & Behavioral Finance
- William Mitchell College of Law, JD, Magna Cum Laude
- Saint Olaf College, BA, Psychology and Family Studies, Magna Cum Laude

DESIGNATIONS/CERTIFICATIONS/CLASSES

- Juris Doctor (J.D.)

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



Kim Cappellano

CEO, FOUNDING PARTNER, PHILANTHROPIC SPECIALIST

A founding partner of Private Wealth Asset Management, Kim has over 20 years of financial planning and wealth management experience. She excels in philanthropic services for nonprofits and private family foundations and brings trust and estate management expertise to individuals and families.

As CEO of Private Wealth Asset Management, she partners with the leadership team to set the vision of our firm, in addition to the short- and long-term strategy. She oversees all areas of the company: finance, operations, human resources, marketing, investments, compliance, etc.

Outside of work, Kim enjoys cooking, reading and playing board games. She and her husband have four children, along with two rescue dogs: a German Shepherd and a German Shepherd mix.

CONTACT

P | 402-246-5423

M | 402-517-1850

E | kimc@privatewealth.com

YEARS OF EXPERIENCE

- 25+ years

EDUCATIONAL BACKGROUND

- University of Notre Dame, MNA
- Creighton University, MBA focused on Quantitative Analysis
- Indiana University, BS, Business Administration and Management
- AA, Financial Planning

DESIGNATIONS/ CERTIFICATIONS/CLASSES

- Certified Trust and Fiduciary Advisor (CTFA®)
- Yale University – Women's Executive Leadership Program
- Graduate, Wells Fargo Business Succession Planning I & II
- Graduate, Wells Fargo Family Dynamics Training

COMMUNITY INVOLVEMENT

- Methodist Foundation Board - Board Member
- SHARE Omaha - Board Member & Treasurer
- Child Saving Institute - Former Board Member
- Women's Fund of Omaha - Former Board Member & Treasurer
- Notre Dame Club of Omaha - Former Board Member & Secretary
- Conceive Nebraska - Former Board Member & Vice Chair

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



ST. LOUIS, MISSOURI | 314-314-6738 | PRIVATEWEALTH.COM