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OKLAHOMA FINANCIAL SPOTLIGHT

Enduring Wealth and Value

Families determined to pass unique wealth to future generations can turn to Shelley Wealth Partners at Rockefeller Global Family Office.

FROM LEFT TO RIGHT: Craig Staley, Client Associate; Michael Shelley, Private Advisor, Senior Vice President; and Paige Hatcher, Private Advisor, Vice President.

Lasting family legacies don't happen by accident. Those determined to pass along enduring wealth and make important contributions to the world have no better model than the renowned Rockefeller family.

"For more than 130 years, nearly eight generations, Standard Oil heirs have demonstrated how to make personal prosperity a force for the common good. Our team is excited to join hands with Rockefeller Global Family Office to help meet the specialized needs of our clients," says Shelley Wealth Partners' Private Advisors Michael Shelley, Senior Vice President, and Paige Hatcher, Vice President, who have over two decades of combined experience working exclusively with high net worth and ultra-high net worth families.

Shelley Wealth Partners made the transition to Rockefeller in 2022 because the firm offered an enhanced level of service to ultra-high and high net worth clients, families, and institutions. The team now has access to a global professional network and financial resources that have been cultivated since 1882.

CREATING A FAMILY LEGACY

Elevating the family office concept, Rockefeller's Private Advisors address the dynamic needs of multigenerational wealth through a range of innovative offerings, connecting clients to the unique solutions best fit for their needs. "Our total financial solution helps to coordinate the services necessary to protect assets and help wealthy families navigate financial complexities," explains Shelley, a native Oklahoman whose clientele includes many second- and third-generation family members.

Through its Strategic Advisory division, business owners and investors have access to a deep bench of investment banking expertise supporting a wide range of endeavors. The firm also offers unique Lifestyle Advisory services, with access to an exclusive platform of providers across travel, private aviation, art advisory, and more. Its open architecture investment philosophy also provides clients with the freedom to invest in a way that works best for them, with broad access to a wide range of traditional and alternative asset classes as well as uncommon investment opportunities. If a family has exceptional needs, Rockefeller seeks to find bespoke solutions.

"Underlying these services is access to an unparalleled network of intellectual capital," says Hatcher, "that brings a legacy of wisdom from preserving and advancing the wealth of seven generations of Rockefeller family members."

She continues, "We have been privileged to support a family of entrepreneurs and philanthropists in preserving and growing their multigenerational wealth. From the patriarch, who built a successful business empire, to his grandchildren, who are now actively involved in managing the family's business interests, we have guided them for multiple generations. Our comprehensive strategies facilitated a seamless transition of leadership, equipped the younger generations with financial education, and fostered a lasting legacy of entrepreneurship, philanthropy, and social impact. This particular family's journey exemplifies our commitment to forging enduring partnerships that empower families to achieve their grandest visions."

At Rockefeller, the standards for their services are the same standards established by a great family legacy. "The trends they have weathered, the familial bonds they have bolstered, and the impact they have had on society inspires us to empower our clients," says Shelley. "Life's grandest visions require a well-thought-out plan, and it's our mission to realize those goals through our expertise."

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