



## Colony Family Offices Welcomes Kathy Habluetzel and David Parker

January 22, 2018 (Charlotte, NC) Colony Family Offices® is pleased to announce Kathy Habluetzel and David Parker as the newest members of our team.

Kathy and David are newly admitted Members of Colony Family Offices, LLC. They both bring valuable experience to Colony and have served ultra-affluent families across the Southeast. Kathy and David bring a comprehensive understanding of the specific needs of multi-generational families.

Kathy has devoted more than 3 decades to the finance, tax and accounting industries. She began her career with Arthur Andersen LLP, and then served as the Tax Partner in charge of the Carolinas Private Wealth Services team at Grant Thornton LLP. In 2010, Kathy became an investment advisor before moving into the role of Family Office Director for members of the Belk Family in early 2014. Her prior experience will strengthen and enhance Colony's internal operations and external collaboration with third-party tax, legal and accounting advisers of the clients we serve.

David brings more than 25 years of leadership experience in the wealth management industry. Prior to joining Colony, he was Managing Director at Abbot Downing, the family office practice at Wells Fargo, in Charlotte for seven years. There he was responsible for overall relationship management and business development activities. He joined Calibre, a predecessor firm to Abbot Downing, in 2004 as a Director of Client Management in Winston-Salem, NC. Prior to Wells Fargo, David held various investment management roles including portfolio manager, research director, and equity analyst at SouthTrust Bank serving affluent families, foundations and endowments. David began his career at a single-family office in Birmingham, Alabama. His prior experience will add depth and breadth to our overall wealth and investment management capabilities.



These recent additions to our team will enhance the services we make available to our clients, including:

- Assisting families through major life transitions (i.e., the sale of a business, business succession for the family-owned enterprise, the death of matriarch/patriarch, and financial education of younger family members).
- Design and implementation of appropriate investment allocation strategies consistent with the client's overall tax, estate and financial planning goals and objectives.
- Enhanced recordkeeping that includes tax and general ledger reporting for families with complex family holding structures such as LLCs, corporations and trusts.