

ABOUT US

# A Legacy of Trust & Generational Thinking

Since 2009, we've been the trusted stewards of family wealth—providing the strategic clarity and personal attention that every family deserves.

OUR STORY

## Founded on a Simple Belief

Family Wealth Advisors was established in Herzliya in 2009 by Daniel Peretz, a financial markets veteran with over 30 years of global experience. The founding premise was straightforward: affluent families deserve the same quality of financial guidance and coordination that was once available only to institutions and ultra-high-net-worth individuals.

We recognized that successful families often struggle not from a lack of resources, but from a lack of integrated oversight. Investments are siloed. Tax advisors don't communicate with estate planners. The big picture gets lost.

Our solution was to create a true "Personal CFO" service—a single point of coordination for all financial matters, driven by your goals and governed by your values.



OUR MISSION

To be the trusted partner that empowers families to preserve, grow, and transfer their wealth with confidence.

We measure success not by assets under management, but by the peace of mind and clarity we bring to each family we serve.

OUR VISION

To redefine family office services in Israel through excellence, transparency, and genuine care.

We envision a world where every family—regardless of complexity—has access to institutional-quality financial guidance delivered with personal attention.

build.



### Integrity First

We operate with complete transparency. No hidden fees, no conflicts of interest, no agenda other than your success.



### Client-Centric

Your goals are our compass. We listen deeply, understand your unique situation, and tailor every recommendation accordingly.



### Excellence Always

We hold ourselves to the highest standards in research, analysis, and execution. Good enough is never good enough.



### Long-Term Thinking

We make decisions with decades in mind, not quarters. Sustainable results require patient, disciplined execution.



### Open Communication

We explain complex matters in plain language. You'll always know what we're doing and why—no jargon, no surprises.

We treat every family's wealth as if it were our own. Your victories are our victories; your concerns are our priorities.

OUR JOURNEY

## Key Milestones

2009

### Foundation

Daniel Peretz establishes Family Wealth Advisors in Herzliya, bringing 25 years of institutional investment experience to serve private families.

2012

### Team Expansion

Key team members join including Gil Ben Zadok and Gilbert Penhasi, expanding our capabilities in legal, operational, and investment management.

WHY FWA

## What Sets Us Apart

The qualities that make our approach genuinely different from traditional advisors.

### Fee-Only Independence

We never receive commissions from product sales. Our only revenue comes directly from clients, ensuring our advice is always aligned with your best interests—not a product sponsor's.

### Holistic Coordination

We integrate investments, tax, estate, insurance, and governance into a unified strategy. No more siloed advisors who don't communicate—we orchestrate everything.

Ready to experience the difference of a true family office partnership?

Schedule a Consultation

