


# Specialty Assets

## People

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**We recognize that wealthy families hold complex assets that are often difficult to administer.** Whether held outright, in trust, or through other entities, we can relieve the burdens associated with managing specialty assets such as oil and gas interests, agricultural land, investment real estate, closely-held businesses, and family limited partnerships.

Our **client-specific services** include:

- Receiving revenues and paying expenses.
- Property valuation.
- Ad valorem tax administration.
- Title analysis and title document review.
- General management, reporting, and file maintenance.
- Accounting for entities that hold interests.
- Engaging and supervising outside expertise such as brokers, geologists, and appraisers when required.

Management of directly-held oil and gas interests requires specialized assistance. Our expertise dates to the 1950s when one of our founding families bought an operating oil and gas business. Since then, we have developed accounting and reporting systems to manage mineral rights, royalty interests, and working interests for our clients.

Our **oil and gas management** capabilities include:

- Fiduciary mineral management, as agent and trustee.
- Royalty and working interest accounting.
- Lease review, evaluation, and negotiation.
- Division order analysis and processing.
- Lease, division order, and contract file maintenance.

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