

WOMEN OF THE C-SUITE

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CO-CEO

Versant Capital Management

Background: As co-owner and co-CEO of a multi-family office, Shabaker helps multigenerational families, women experiencing life transitions, executives, entrepreneurs and business owners connect the facets of their financial lives to help them reach their life goals.

Az Business: How does being a skilled leader help your clients identify and reach their goals?

Elizabeth Shabaker: Being a skilled leader helps me assess, plan, coordinate and communicate our client's complete financial picture to identify blind spots and opportunities to address items that may otherwise have the potential to hinder their long-term goals.

The ability to fully understand financial complexities, navigate them, and strategize sound solutions requires a level of oversight that comes with experience and dexterity. My process and skill set, coupled with our firm's diverse service offering, provide the foundation for managing our client's financial picture and lifestyle needs, even as market conditions and personal circumstances change.

AB: How do your skills, experience, and specific areas of expertise best serve your clients?

ES: From investment portfolio strategies to private wealth management, tax and estate planning, liquidity and exit planning, trust services, philanthropic planning, family governance, and lifestyle concierge services, Versant provides support for each client's unique situation. My knowledge of each of these important wealth management areas comes from 25+ years of advising high-net-worth families.

Wealth is complex and touches all aspects of life, from family to career, hopes to fears, and goals to needs. This complexity requires careful treatment and can take up our client's most precious resource: time. Leveraging my experience within our multifamily office means that people receive comprehensive services in one place.

AB: What do you enjoy most about your work?

ES: Growing and preserving our client's asset values, preparing the next generations to be responsible wealth owners and ensuring their shared goals are what I love most. I work with families, their children and their grandchildren to develop a governance framework that aligns with their values to prepare them to manage wealth responsibly and be good community members. Providing in-depth financial education to succeeding generations can help ensure their family's wishes and legacies are carried on.

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