

Pegasus Capital Management Inc.

Overland Park, KS/6 employees
Owner: **Ray D. Evans, John H. Chalfant,
Tim J. Helfer**

"It's important to stick to your plan and keep grinding away. Keep the faith that what you are doing is the right thing to do." — Ray Evans



Managing wealth at any level brings both a tremendous opportunity and a tremendous responsibility for individuals, families and corporate fiduciaries. Addressing the issues of generational wealth requires adding the right partners.

Pegasus Capital Management was founded in 1990 and serves the financial and lifestyle needs of a family and its future generations. Those needs range from investment management and corporate benefit planning to art collection coordination and asset protection.

The company's services include investment monitoring, financial and estate planning, asset protection, personal, partnership and trust tax management, credit management, trust administration, insurance coordination, family communication and meeting planning, philanthropic strategies and corporate benefit programs through Heritage Benefit.

"The family office business model is not a volume business," Evans said. "Our organization is very 'high-touch,' and we are committed to the preservation and protection of our clients' assets for multiple generations."

The confusing and convoluted state of the financial services industry causes Pegasus the most headaches. Between stockbrokers, community banks and insurance salesmen, Pegasus clients have a difficult time sifting through the various platforms and professionals available in this industry. However, research has shown that most families want a "point person," someone who can coordinate the tax, legal and asset management functions out of one office.

"I would clearly have started down this 'family office' concept much earlier if I'd known what I know now," Evans said. "It is comprehensive; it is solutions-oriented; and it is what the high-net-worth family wants."

Evans said that at Pegasus they are politely persistent. This ensures they complete the long list of tasks necessary for their clients to be financially successful. These typically are tasks that require a lot of coordination between clients, attorneys, trust departments, tax advisors and human resource managers.

"It is our responsibility to get all parties engaged and working together."