

PATG Creates Advisory Board to Guide Critical Tax, Economic Policies for Family Offices, Successful Family Businesses

Five Member Group Offers Private Equity, Entrepreneur, and Legal Insights

WASHINGTON , DC, UNITED STATES, July 3, 2025 /EINPresswire.com/ -- Policy and Taxation Group, advocates on Capitol Hill for family offices and successful family-owned businesses, has formed a new Advisory Board to assist it in its economic and tax policy initiatives.

The new five member Policy and Taxation Group (PATG) Advisory Board consists of leaders from private equity, law, entrepreneurship, investment, family offices, and business strategy.



[The Advisory Board](#) will assist in developing priorities and policies that benefit and protect the interests of family offices, family businesses, and successful families, according to Pat Soldano, President, Policy and Taxation Group.

The [PATG Advisory Board](#) structure was initiated by private equity pioneer Robert F. Mancuso, founder and Chief Executive officer of Capri Capital Partners, Palm Beach, Fla. Mancuso was also the founding President and CEO of Merrill Lynch Capital Partners and launched Wall Street's first captive private-equity fund.

Also joining the Advisory Board is Alexander Paul, lawyer and entrepreneur, founder of Nevada-based Wealthgate Trust Company and GIVE, a fintech philanthropy platform and Scott A. Allen, Partner in Tava Port Streets LP, a real estate development and investment company, based in Southern California.

Rounding out the board are Noah Hannon, Chief Operating Officer of ABS Legacy Partners, LLC, Hickory, N.C., and head of operational strategy and delivery of comprehensive family office

services, and Kevin Bergman, President, Olympus Ventures, Minneapolis, Minn., a family office supporting Richard M. Schulze and future generations, including financial support for the Richard M. Schulze Family Foundation.

“With this team of advisors, along with our board of directors, Policy and Taxation Group will be provide our lawmakers in Congress with the most critical issues affecting the long-term growth and prosperity of our country’s strongest economic engine, America’s family-owned businesses,” said Soldano in announcing the Advisory Board. Soldano is also President of PATG’s sister organization, Family Enterprise USA.

[Research shows family-owned businesses](#), the largest private employer in the country, account for 83.3 million jobs in some 32 million family businesses across the country. These businesses contribute \$7.7 trillion annually to U.S. gross domestic product, according to research conducted by Family Enterprise USA and Policy and Taxation Group.

Family Enterprise USA and Policy and Taxation Group educate and advocate on behalf of family-owned businesses, family offices, and successful families on tax and economic policy issues with Congress.

For more information on the PATG Advisory Board and its members go to: PATG Advisory Board.

About Policy and Taxation Group

Policy and Taxation Group (PATG) is the Voice in Washington, D.C., of Family Offices and Successful families and is focused exclusively on the Tax and Economic Issues that impact them. Since 1995, PATG has been the leading advocacy group working to reduce and eliminate estate, gift, and GST taxes while blocking increased income and capital gains taxes, the creation of a wealth tax, and other hostile tax policies that punish hard work and success. PATG is a 501(c)(4) organization comprised of families directly or indirectly impacted by these harmful taxes and regulations. For more information or to support, see www.policyandtaxationgroup.com.

About Family Enterprise USA

Family Enterprise USA promotes family-owned business creation, growth, viability, and sustainability by advocating for family businesses and their lifetime of savings with Congress in Washington, D.C. FEUSA represents and celebrates all sizes, professions and industries of family-owned enterprises and multi-generational employers. FEUSA is a 501.C3 organization

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