

Private Family Office

AN INTRODUCTION



IN WEALTH, AS IN MUSIC, A TRULY
GREAT PERFORMANCE IS IN THE
HANDS OF THE CONDUCTOR.



PrivateFamilyOffice.com



**FAMILIES
ARE BETTER
SERVED
WHEN
EVERYONE
WORKS IN
CONCERT**

WEALTH IS MORE COMPLICATED THAN INVESTMENTS ALONE.

It's entwined through every aspect of our lives—from business and financial interests, to real estate and other assets, to household administration, and even family aspirations...things that can't be measured by year-end performance.

When faced with such complexity, practical families typically assemble a team of trusted professionals for guidance. Financial advisors to focus on the growth and health of their portfolios. Accountants, attorneys, and insurance consultants to minimize liabilities and identify opportunities.

Unfortunately, though they all work on the behalf of a family, they often do so separately, concentrating on objectives within their own fields of expertise.

Families of means understand that wealth—true wealth, the kind that secures retirements and spans generations—results from a broader vision and a more coordinated approach. That building and preserving a legacy requires looking beyond a lifetime. That they are better served when they establish a private family office to enable their professional advisors to work in concert to manage and preserve their assets.

A SINGLE FOCUS. A MULTITUDE OF SERVICES. ABSOLUTE PEACE OF MIND.

Legendary families like the Rockefellers and Vanderbilts were among the first to establish private offices to manage great fortunes. Their strategies live on in the modern family office, traditionally available to only the most affluent of investors—until now.

Using exclusive technology, Private Family Office integrates the services and expertise essential to enriching your life and enhancing your family's overall security. It empowers your trusted professionals to collaborate and share a common vision—one that's highly attuned to your unique circumstances.

It's rather like having a CFO for your family. An expert to help you realize your immediate goals while, at the same time, looking to the next generation to improve your family's financial future.

You'll find you have far greater control over your assets—and will expend far less effort—when everyone involved with your investment, tax, and legal affairs is connected and coordinated. You'll feel secure knowing that guidance on diverse matters can be provided by a multidisciplinary team when needed. You'll be free to enjoy your success today while your Private Family Office works to help protect and grow your investments for future generations.

WEALTH, ORCHESTRATED

- Asset Management
- Insurance & Risk Management
- International Investing
- Estate Planning & Asset Transfer
- Household & Lifestyle Administration
- Tax & Financial Planning
- Trust Services
- Education & Succession
- Legal Advisory
- Philanthropy

**...It's like having
a CFO for your family.**



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BENEFITS BEYOND WEALTH

More time

Being freed from managing wealth's details allows you to focus on the things you truly enjoy.

Peace of mind

You'll worry less because you know your family is protected, today and in future generations.

Extraordinary convenience

When your affairs are centrally managed, expert and unbiased advice is but a phone call away.

Less complexity

Savor the pleasures of a simpler life with someone else minding its details.

INVESTED IN YOUR FAMILY.

Such a far-reaching view of success is only possible with a thorough understanding of your family's circumstances and dynamics, its resources and aspirations, its challenges and complexities.

This unprecedented view into your family provides the foundation for your Private Family Office—and will later inform every consideration that affects your financial well-being. By viewing your investments, assets, and business interests from the perspective of the family as a whole, Private Family Office can help to organize your resources in ways that maximize their potential while seeking to avoid expensive pitfalls.

CONCIERGE FINANCIAL ADVICE.

Individually, your family's trusted advisors are highly accomplished professionals who draw upon their own expertise as well as the lessons learned through their clients' dynamic lives. When brought together by Private Family Office, their ability to collaborate results in unparalleled and unbiased insight, fosters long-lasting relationships with families, and enables them to help you navigate through times of opportunity and of crisis.

Private Family Office allows your advisors to coordinate with each other to ensure everyone shares a common vision.

WEALTH, ORCHESTRATED.

For too many families, financial success complicates life as much as it enriches it, consuming time and creating constant stress. Involving skilled professionals can help, but they often concentrate on individual specialties. Long-term success is fully realized only when wealth is orchestrated to focus on the needs of your family as a whole.





THE FAMILY OFFICE: A RICH HISTORY

Rockefeller. Carnegie. Vanderbilt. The very names synonymous with great wealth and enduring legacies were among the first to establish private offices to manage and preserve their families' fortunes.

Their strategy of treating accumulated personal assets like a business lives on in the modern family office, as does the belief that one lifetime must be considered the short-term. Until recently, family offices were available to only the most affluent of investors.

Today, Private Family Office helps investors with more modest—but still significant—means amass greater wealth by understanding, managing, and coordinating its complexities through every market environment and changing family dynamics.

The most successful of lives are those which are thoughtfully advised. Even with the most expert guidance, though, many families still fall short of their full potential because they lack a master plan that connects the professionals who assist them.

Private Family Office designs the map to more prosperous futures. By enabling your trusted advisors to work in accord, Private Family Office ensures everyone's focus remains on one common goal: increasing your financial security to enrich your lifestyle today and secure a legacy for future generations.

Wealth, orchestrated. 



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YOUR WEALTH IN REAL TIME, ANY TIME

Private Family Office provides your advisors—financial, legal, tax, insurance, and all other professionals important to your family—with unparalleled insight into your resources and obligations, your family, and your goals. This enables them to have the ability to provide you with coordinated and comprehensive advice to proactively maximize opportunities and address problems. Until now, this level of service has only been available to ultra-high net worth families employing dedicated family offices.

To empower multidisciplinary teams, Private Family Office is powered by StradPro 2.0, the Stradivarius of financial software.

PrivateFamilyOffice.com

StradPro 2.0SM
The Stradivarius
of financial software

