



Analyze. Accelerate. Achieve.

TAG Family CFO 7-Step Process: *Achieve*

STEP		PHASE OBJECTIVES	KEY DELIVERABLES
1	Receive Client Information	ANALYZE	“What are your needs?” Project Objectives (“Success Sheet”), Preliminary Net Worth Statement
2	Receive Vendor Information		“Getting organized” Comprehensive list of vendor and account information shared on FON
3	Client Setup	ACCELERATE	“Connecting all the dots” Organizational Chart, Financial Calendar of Due Dates, Family Office Network
4	Client Process		“Managing the cash” Cashflow Report
5	Financial Statement Preparation	ACHIEVE	“Creating financial clarity” Customized Financial Report
6	Beyond the Numbers		“Going above and beyond” Cost Analysis Report, Risk Analysis Report
7	Annual tax organizer		“Pulling it all together” One Page tax summary sheet outlining information sent to the CPA



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