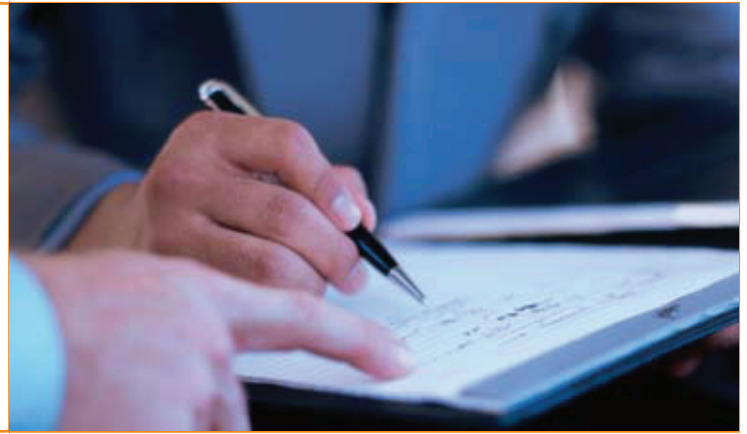
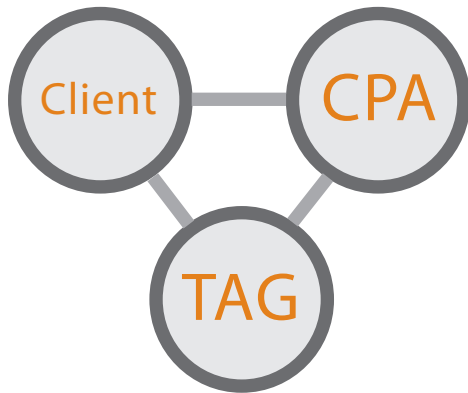




ANALYZE. ACCELERATE. ACHIEVE.



## How TAG Family CFO works with CPA's



TAG Family CFO does not do taxes or tax planning. We work in partnership with CPAs to provide the highest quality data and financial reporting to establish a holistic view of the client.

Not only does TAG Family CFO help fulfill CPA requests within the family, but we also keep the CPA informed of relevant events in the families financial life.

[www.teamtag.net](http://www.teamtag.net)

### Value to a CPA

- > Controller-level point of contact with client
- > Reliable client data
- > Customized reporting for planning needs
- > Better client visibility

### Value to the Client

- > Timely & accurate financial reporting
- > Scalable accounting resource
- > More free time & financial peace of mind

"TAG Family CFO has always proven to maintain sensitive client information with the utmost security and competence."