



*Commitment. Stakeholder Enrichment. Continuous Improvement.*

## **Case Study: Family Relocation**

### **Client:**

A long-term TAG Family CFO client, with controller-level services, requested executive assistance to manage a relocation project.

### **Situation:**

The family's main house was under construction and they needed to relocate temporarily. While in the middle of a remodel, along with a busy schedule, they required a resource to oversee all the details of the move.

### **Solution:**

#### **TAG Family CFO's Personal/Executive Assistance included the following:**

- Connecting the family with "white glove" movers, experienced with high-end moves and transferring valuables
- Researching pricing and terms for storage facilities
- Taking inventory of household items and valuables
- Assisting with pick-ups for charitable donations
- Wrapping and packing smaller items
- Ensuring the cancellation of all utilities and returning cable boxes and internet modems
- Facilitating the move on schedule without disruption
- Setting up phone and internet
- Unpacking kitchen items on the first day, so the family was able to be function able

### **Results:**

TAG Family CFO was able to alleviate the stress out of moving, by being the point person for all communication and seamlessly executing the family relocation. From start to finish, the family was able to move in a short amount of time, with little disruption in their daily life. They were assured that their personal, valuable items were properly taken care of and accounted for during the move.

With personal/executive assistance services, TAG Family CFO provides resources on a project or ongoing basis. These service offerings are customizable to help manage the personal lives of our Clients.

### **Client Testimonial:**

*"Thank you for all your help, you are delightful to work with!" "I want you to know that I appreciate your help through this process and value your judgment."*

**TAG Family CFO Client**

*...engage in the **success** of everyone we touch.*