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Analyze. Accelerate. Achieve.

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*“Our goal is to reduce our clients’ stress by putting their financial lives on autopilot, so their time can be spent more wisely, for its highest and best use.”*

—ANNEKE STENDER, VICE PRESIDENT, TAG FAMILY CFO

01

Comprehensive, accurate  
and timely information gives you  
true control of your wealth

### The truth about success.

With great wealth comes great responsibility. Your financial life may be complex with multi-faceted undertakings such as alternative investments, corporate entities, private equity, international exposure and collective properties. Over time, you may also have acquired a team of trusted advisors to help you handle the maze of legal issues, tax planning needs, insurance coordination, banking and financial investments. Much of your free time is spent dealing with corporate and household accounting issues, leaving little room to relax with family and friends and enjoy your wealth.

TAG Family CFO delivers financial peace of mind by helping affluent families and individuals organize, coordinate and navigate through their financial affairs. We work in partnership with your trusted advisors to provide the highest quality of data and financial reporting to establish a holistic view of your assets and financial holdings. This gives you true control of your wealth and establishes the foundation for effectively implementing your financial strategies.



03

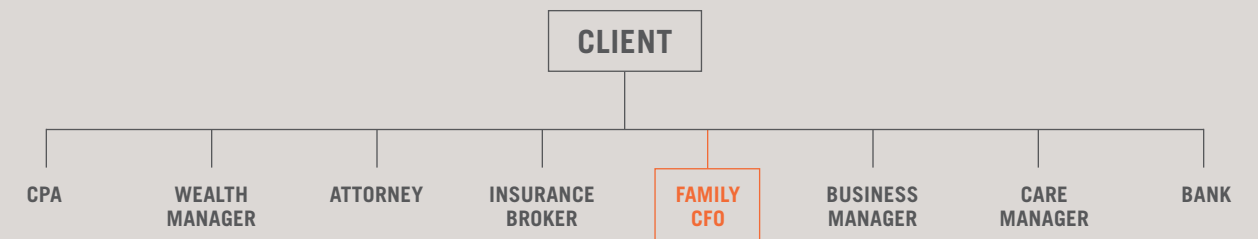
## Bringing professional insights to your personal finances

*“The month-end financial reports that TAG Family CFO provides to my clients give a clear, aggregated picture of their current financial status and helps establish wealth preservation.”*

—CLIENT’S ESTATE ATTORNEY

### TAG Family CFO is the final piece in your personal financial team.

At TAG Family CFO, our experienced team streamlines the efforts of your personal financial team to ensure that all aspects of your financial life are working together in an efficient and strategic manner. A collaborative implementation with all your professional advisors leverages their total expertise and gives you the backdrop to make better financial decisions and achieve your goals.





*“Thank you so much for all that you have done for my family. Your team has provided us with such great confidence now that our finances are in order. What a relief!”*

—CLIENT

05

TAG Family CFO  
helps orchestrate your  
financial well-being

**Experience the TAG Family CFO Difference.**

Our services are customized to meet the needs of any situation. Whether you are an affluent family, high-net-worth individual, busy CEO, or retiree, TAG Family CFO brings a unique approach towards your personal financial management, bookkeeping and reporting. We are committed to exceeding your expectations with a controller-level’s insight in managing personal finances.

- Bill Payment
- Bank & Credit Card Reconciliation
- Cash Flow Management
- Monthly Financial Statements
- Personal Financial Reporting & Analysis
- Payroll Services
- Budgeting
- Cost Analysis
- Foundation Accounting
- Trust Accounting
- Insurance Coordination & Oversight

# 07

## Taking you Beyond the Numbers

### Providing the information and insights you need to make knowledgeable decisions about your wealth.

Utilizing our 7-Step Process, TAG Family CFO customizes a plan and creates a roadmap with objectives and milestones. This allows for simplicity, focus and balance in your financial affairs.

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 sheeting outlining information sent to the CPA



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

—CLIENT’S CPA

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# Committed to your privacy



## Professionalism and trust are the cornerstones of our firm.

Enjoy the peace of mind in knowing your assets are being monitored by an independent firm with a long history of continuity and confidentiality. At TAG Family CFO, every engagement and task is handled with the utmost discretion and attention to detail. We respect your privacy and take great measures to protect it.

We ensure compliance with best practices and internal control procedures. Our solid system of checks and balances gives our clients reassurance in the integrity and security of their private information and financial data.



*“TAG Family CFO is successful because we understand that outstanding customer service is about turning that once-in-a-lifetime customer into a lifetime customer.”*

—ROBERT SCHERER, PRESIDENT, TAG

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# Adding simplicity and clarity to your financial lives

## We don't just work for you—we work with you.

Since 1996, TAG has provided outsourced accounting solutions to small and medium-sized businesses. TAG works closely with clients, to understand their unique needs and handles the numbers, so they can focus on the core of their business.

The TAG Family CFO division was established to focus on the personal finances of our busy clients. Anneke Stender, Vice President, TAG Family CFO, leads an experienced team who

provide world-class family accounting and reporting. Our dedicated professionals have a passion for perfection and constantly strive to provide the highest level of service quality.

TAG Family CFO stands behind our core values of **Commitment, Stakeholder Enrichment** and **Continuous Improvement**. We aim to ensure that these guiding principles flow on to our clients, team members, centers of influence and community.

*“As a long-term client, I count on TAG Family CFO to not only help organize my financial life, but also take care of other personal tasks.”*

—CLIENT

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# The Modern Family Office

## Your Personal, Financial Concierge.

TAG Family CFO acts as a “modern family office” and will assist with a myriad of tasks associated with managing your personal life. Our services can be customized to meet the needs of any situation, with a wide range of special projects and oversight.

- Calendar Management
- Appointment Setting
- Travel Arrangements
- General Errands
- Mail Services
- Vendor Management
- Property Management
- Household Staff Management
- Personal Assistant
- Project Management
- Relocation Assistance
- Delivery/Repair Waiting

Are you ready to simplify  
your financial life and take  
true control of your wealth?

**Let TAG Family CFO provide you a value  
that exceeds its cost. Financial peace  
of mind is priceless.**



*To learn more, visit: [www.teamtag.net](http://www.teamtag.net)  
To schedule an introductory consultation,  
please call: 888 TEAM TAG*



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