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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, EXECUTIVE VICE PRESIDENT, TAG

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 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. This gives you true control of your wealth and establishes the foundation for effectively implementing your financial strategies.

03

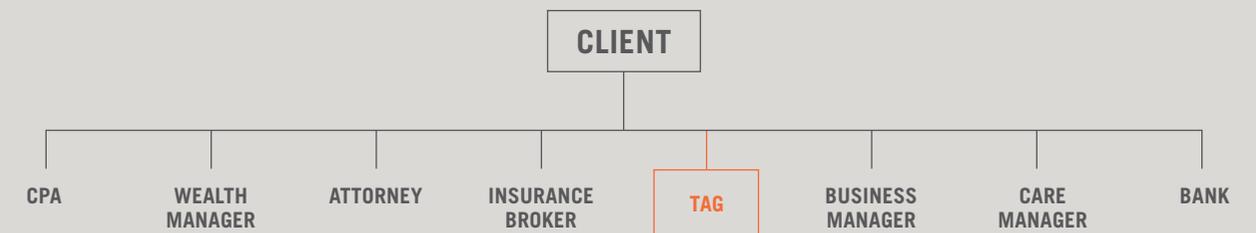
Bringing professional insights to your personal finances

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

—CLIENT’S ESTATE ATTORNEY

TAG is the final piece in your personal financial team.

At TAG, 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 helps orchestrate your financial well-being

Experience the TAG 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 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

07

Simplicity, focus & balance
in your financial life

Bill Pay 7-Step Process

TAG will coordinate family bill pay services, so you can spend your time more wisely, for its highest and best use. Not only will your bills be paid on a timely basis, but they will be monitored, reconciled and reviewed. TAG sets up processes and procedures to execute bill pay following a 7-Step process.

STEP		PHASE OBJECTIVES	KEY DELIVERABLES
①	Receive Client Information	ANALYZE	“What are your needs?” Completed new client questionnaire & reporting: asset listing, P&L and GL
②	Propose a Solution		“Analyze the information received” Prepare and present a proposal
③	Engage with the Client	ACCELERATE	“Connecting all the dots” Initial new client checklist outlining tasks during transition
④	Client Setup		“Establishing bill payment process” Prepare new client documents, Setup system map task list & document filing procedures
⑤	Client Process	ACHIEVE	“Managing the tasks” Bill payment, vendor management reconciliations
⑥	Reporting		“Creating financial clarity” Monthly cash flow report
⑦	Year End Wrap Up		“Pulling it all together” Year end reconciliations & GL review 1099/1096 filings & supporting docs to CPA and Advisor

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

—CLIENT’S CPA

09

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, 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 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 Personal Accounting division was established to focus on the personal finances of our busy clients. Anneke Stender, Executive Vice President, TAG, 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 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 to not only help organize my financial life, but also take care of other personal tasks.”

—CLIENT

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Your personal, financial concierge

Beyond the Numbers.

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



*To learn more, visit: www.teamtag.net
To schedule an introductory consultation,
please call: 888 TEAM TAG*

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