

# TBG FAMILY OFFICE

## WHO IS THE CANDIDATE?

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- Those with investible assets custodied (or in transition) at TBG in excess of \$10 million
- Clients with estate tax exposure (a net worth above \$30 million)
- Those looking to pay an AUM fee for investment management and a bundled fixed fee for wealth and tax services
- Those who use TBG tax services
- Those who value financial organization and audit resilience
- Those with complexity and gravitas in their financial picture
- Those looking to consolidate authority, control, and process with a single team – us!

## WHAT WILL WE DO DIFFERENTLY?

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- Charge the client a flat fee for Family Office and tax services and a reduced basis point fee for investment services
- Focus on the administration of their balance sheet, personal books, and financial recordkeeping (including a detailed client portal)
- Manage household and entity bookkeeping: bill pay, ledgers, payroll, loans, monthly/yearly reporting package
- Create, manage, and monitor an estate and trust plan that is current and effective
- Support family governance and a simple meeting rhythm as the clients desire
- Integrate planning with real estate holdings
- Provide first access to TBG-sourced direct investment deals
- Streamline philanthropy through optimal asset selection and strategic gift timing
- Address P&C insurance issues and close gaps for all clients
- Utilize TBG Risk Department for sophisticated case designs - ILIT, PPLI, Buy-Sell Agreements, etc.
- Track loans, gifts, and send Crummey notices every year
- Add value through managing financial operations and creating financial organization
- Provide a differentiated “on-call” VIP experience

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