



WHY THE “VIRTUAL FAMILY OFFICE” IS THE MODEL OF THE FUTURE



Why The “Virtual Family Office” Is The Model of The Future *And How You Can Take Advantage of It*

There has never been a better time to be plugged into a Virtual Family Office. With the proper guidance, individuals receive proactive and holistic advice from best-in-breed professionals working in collaboration to achieve their personal and professional goals.

What is a Virtual Family Office?

Although it sounds crazy, most professionals do not work together to ensure that their individual expertise creates synergy with their clients' other professionals. Most CPAs, attorneys, financial advisors, insurance agents, business consultants, etc., all work reactively in their own “silos”. They rarely consider or discuss how their advice may impact the holistic planning needs of the client.

Imagine how dangerous this same lack of joined-up thinking would be if medical professionals did not communicate with each other similarly.

That is why a Virtual Family Office (VFO) is the future. The VFO allows individuals' most trusted advisors to work together. The objective is to keep the clients' best interests in mind putting them in control of their financial priorities and needs.

"As part of this systematic process, each consultant brings their expert ideas to the table for critique, vetting and strength testing. Only the best ideas survive, and agile strategies are formulated to drive unique, strategic solutions for the individual client. This is done for every issue family offices face and strategies continue to be tested and adjusted to make improvements." - Francois Botha, Forbes 2022



Introducing A NEW MODEL FOR THE FUTURE

A New Model

We work as a part of a proactive planning team that connects our clients directly to our Virtual Family Office.



Our mission is to help our best clients maximize their personal and professional potential. You can think of us as your "go-to" planning team to help with anything and everything, rather than going to multiple centers of influence.

We provide value with

- Forward-Looking Advice
 - *To shape your future*
- Proactive Advice
 - *For you and your needs*
- Value-Added Solutions
 - *Exceeding your expectations*

You're not in this alone! We will hold your hand on the journey and provide access to the VFO with direction and guidance.

Why The Team Based Model?

When a Financial Advisor and a CPA come together to form a “Proactive Planning Team,” and supplement their areas of expertise with a robust Virtual Family Office, a significant win/win/win is created.

In short, Financial Advisors, along with their VFO team members, can provide services that CPA clients need but are not receiving. Likewise, CPAs can use their existing client relationship and trust to provide a platform for the solutions to be executed in an efficient and holistic manner.

The key is to focus on building a value-based relationship with clients, rather than being obsessed by the number of transactions you can complete.

We want to offer what clients truly VALUE not just what they EXPECT of us.

Let's dive into each of the 5 main areas of the Virtual Family Office.

Tax Planning

Most CPAs do little more than record history, simply focused on putting the right numbers in the right boxes. There is a big difference between preparing tax returns and doing proactive tax planning. True tax planning requires a team of top-notch professionals that scour the eighty thousand plus pages of the IRS tax code looking for every legal deduction and loophole available to minimize your income taxes, estate taxes, and capital gains taxes.

CFOs, tax directors and business owners come to us for much more than tax compliance. While we excel by ensuring you meet regulatory requirements, both domestic and global, that just scratches the surface of what our tax accounting team does. Whether you're looking to improve profitability, grow your business or implement a succession plan, we see proactive planning as a key strategic tool – as nothing less than a vital means of moving your company forward.

Remember, we work for you not for the IRS. Many of our clients save many times the fee in reduced tax liability through careful planning and legitimate tax strategies.

Wealth Management

Wealth management is a bit science and a bit art. Overall the goal is to grow, protect, utilize, and disseminate wealth. Effective wealth management requires a united team of professionals working together across multiple financial service industries. We incorporate financial advisors, accountants, attorneys, insurance agents, and countless niche experts to provide an all-encompassing approach to wealth management.

Legal

We have assembled a team of top attorneys from across the country to help you navigate complicated laws involving business structuring, estate planning, asset protection, and other legal areas. Our team specializes in areas that complement our clients' present and future business and personal goals. If you already have local counsel that you would like to maintain, our team can work alongside your current professionals. Alternatively, we can provide complete legal solutions for virtually any legal need or concern.

Risk Mitigation

When growing personal net worth or building a business, most people are solely focused on the upside potential. However, as your successes increase, it becomes equally important (if not even more important) to mitigate your risks. Whether that involves the use of life insurance, property and casualty insurance, a captive insurance company, or other related tools, the goal remains the same, protect your downside exposure in the most strategic and cost-effective way possible. Risk mitigation experts on our team match clients' needs with the best available products and strategies in the marketplace.

Business Advisory

Countless "professionals" will gladly manage your money after you sell your company, but who is by your side while you are growing it? Who do you call when you are having employee engagement issues? Or when your revenue is slipping and you are not sure what key performance indicators to focus on to get things back on track? Those are just two examples of endless scenarios that small and medium sized business owners regularly face. Growing a business is not easy, which is why our business owner clients have access to numerous experts on our team that can help them every step along the way.

By adopting this well rounded approach, we become your partner in planning.

- *Start with discovery and diagnostic*
- *Clarify goals, direction, vision*
- *Work to build proactive plans*
- *Access wider virtual expertise*
- *Take action & implement solutions*
- *Sustain through regular meetings*

This model allows you to have one point of contact for all of your financial needs.

A truly holistic and comprehensive solution with top-notch results, coming from some of the best experts in the country.

We hope to take this journey with you!