

# MULTI-FAMILY OFFICE SERVICE MATRIX

WEALTH ENGAGE

**WealthEngage works intimately with families.** While we provide a vast array of services, the greatest value we provide is confidence. Our mission is to serve as your family's financial advisors for life, handling all matters related to managing and preserving your wealth, and building your legacy - so you are free to focus on enjoying your life and the people important to it. We engage all generations through education and diligent advice.

## + WEALTH MANAGEMENT

| Investment Management     | Advanced Planning                  | Private Investment Banking                                |
|---------------------------|------------------------------------|---|
| Asset management          | Estate planning                    | Buying and selling interests in business and other assets |
| Asset allocation          | Tax planning                       | Capital raising   |
| Manager selection         | Asset protection                   | Sourcing bank loans                                       |
| Alternative investments   | Wealth enhancement strategies      | Sourcing Investors  |
| Structured investments    | Executive compensation planning    | Restructuring   |
| Treasury/ cash management | Succession and transition planning | Structured capital markets and lending                    |
| Hedge funds               |                                    |   |
| Private equity            |                                    |   |

## + SUPPORT SERVICE

| Administrative               | Lifestyle                  |
|------------------------------|----------------------------|
| Data aggregation             | Family security            |
| Bill paying                  | Concierge services         |
| Tax preparation coordination | Medical Concierge          |
| CFO services                 | Philanthropic advisory     |
| CIO Services                 | Formal family education    |
|                              | Property Management        |
|                              | Managing Arts/Collectibles |

|   | WE In-house | Raymond James Specialist | Collaboration with outside expert | Referred to outside expert |
|---|-------------|--------------------------|-----------------------------------|----------------------------|
| <b>WEALTH MANAGEMENT</b>                      |             |                          |                                   |                            |
| <b>Investment Management</b>                  |             |                          |                                   |                            |
| Traditional Asset Management                  | X           |                          |                                   |                            |
| Asset Allocation                              | X           |                          |                                   |                            |
| Manager Selection                             | X           |                          |                                   |                            |
| Risk Management                               | X           |                          |                                   |                            |
| Access to Alternative Investments             | X           |                          |                                   |                            |
| Advanced Planning                             |             |                          |                                   |                            |
| Private Banking                               | X           | X                        |                                   |                            |
| Estate Planning                               | X           | X                        | X                                 |                            |
| Tax planning                                  | X           | X                        | X                                 |                            |
| Protection of Assets                          | X           | X                        | X                                 |                            |
| Wealth enhancement/transfer                   | X           | X                        | X                                 |                            |
| Charitable giving                             | X           |                          | X                                 |                            |
| Business Succession                           | X           |                          | X                                 | X                          |
| Coordination with bankers/attorneys/insurance | X           |                          |                                   |                            |
| Investment Banking                            |             |                          |                                   |                            |
| Mergers & Acquisitions                        |             | X                        |                                   |                            |
| Private, Equity, Debt Capital                 |             | X                        |                                   |                            |
| Recapitalization & Restructuring              |             | X                        |                                   |                            |
| <b>SUPPORT SERVICES</b>                       |             |                          |                                   |                            |
| <b>Administrative</b>                         |             |                          |                                   |                            |
| Bookkeeping                                   |             |                          |                                   | X                          |
| Bill-paying                                   | X           |                          | X                                 |                            |
| Accounting                                    |             |                          |                                   | X                          |
| Tax Preparation                               |             |                          | X                                 |                            |
| Cash Flow Management                          | X           |                          |                                   |                            |
| Cash Management                               | X           |                          |                                   |                            |
| Managing Debt and Leverage                    | X           |                          | X                                 |                            |
| Trustees services                             |             | X                        |                                   |                            |
| Family foundation administrations             |             | X                        |                                   |                            |
| <b>Lifestyle</b>                              |             |                          |                                   |                            |
| Family security                               |             |                          |                                   | X                          |
| Concierge Services                            | X           |                          | X                                 |                            |
| Philanthropic Advisory                        | X           | X                        | X                                 |                            |
| Family Education                              | X           |                          |                                   |                            |

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. DBA. is not a registered broker/dealer and is independent of Raymond James Financial Services, Inc.