Family Office Services

FOR GENERATIONS

tpo the private office

Award-winning, Chartered Independent Financial Planning firm

Our Family Office service sources, coordinates and ensures all the services wealthy individuals and families need are provided for.

Based on the original principles of a traditional Family Office, our specialist team manages the financial affairs of many wealthy individuals and families. We provide a highly personalised, responsive, and secure advice service that is specific to you and your family's needs.

Building strong relationships with you and significant people in your life enables us to understand what is important to you. We coordinate and work with your existing team of professional advisers (such as your tax adviser, legal adviser, private banker, investment manager etc.) or create a team for you to deliver a comprehensive financial plan. Your plan will inform and determine your tailored investment strategies, which will be proactively monitored and reviewed.

We take pride in advising with integrity and clarity, providing clients with simplicity and peace of mind. In partnership with you, we will support your lifestyle, look after your family and help you to grow, preserve and transfer your wealth for future generations. Providing an independent advice service enables us to entirely focus on you and your family's needs, ensuring that the decisions and subsequent solutions are always made in your best interest.

Stuart Phillips
Chief Executive, The Private Office

Comprehensive financial planning supported by a tailored investment strategy, advising with integrity and clarity to provide peace of mind.

Working with our Family Office Team

As your financial confidants, we prioritise relationships, empower informed decisions, and provide comprehensive services with a strong regional presence.

We Can

- Work in collaboration with your existing Family Office team, or
- Create and coordinate a Family Office team of professional partners for you where there are gaps in your current arrangement
- Help you solve a specific issue or deliver a one-off project

We Will

- Place emphasis on planning and asset structuring and stay ahead of, or keep pace with, legislative changes
- Ensure that everyone in your family feels at ease and confident dealing with wealth
- Be available for you to contact or visit in person when you need us. We have a well-established regional presence

Our Family Office services

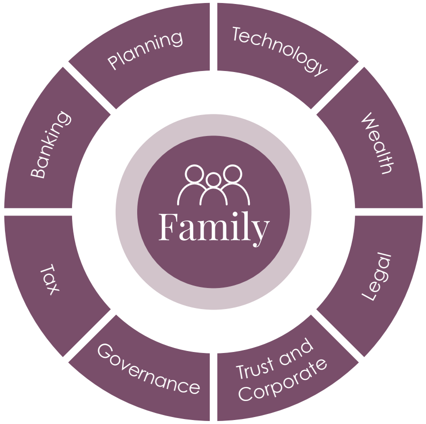
Financial Planning

Our award-winning, Chartered independent financial planning is at the heart of our service. We have strong experience of multi-generational financial planning and maximising wealth, but can assist with all aspects of financial planning to suit you and your family's needs.

Some of our services include:

- Cash flow forecasting analysis to establish financial security
- Cash flow stress testing for risk management
- Comprehensive financial planning and tax planning efficiency review, which includes tax and legislative updates and action as appropriate
- Succession planning
- Estate planning
- Pension reviews and transfer services
- Retirement planning
- Equity release planning
- Life management, budgeting, expense reporting and analysis
- Protection planning services
- Long-term care planning
- Charitable giving and philanthropy
- Advice on pension nominations and transfer of pension wealth on death

The service we provide includes a range of support from ourselves in our areas of expertise, as well as carefully outsourced services provided by trusted partners.



Investment Advice

We have a highly qualified and experienced independent investment team whose expertise allows us to offer you a wide range of tailored investment solutions.

Family Governance

You and your family will be at the heart of your Family Office team. Alongside your legal advisers, we will support you, whether that is through aligning family members through a documented and agreed charter, educating and mentoring around financial, tax and legal matters, or mediation and conflict resolution.

Philanthropy is often a key focus for many of our clients and your team will work collaboratively with your existing or newly appointed legal adviser to set up and oversee this. This can involve creating philanthropic statements, setting up trustee obligations and reporting, and establishing an investment policy statement.

Tax Services and Advice

In collaboration with existing or newly appointed tax advisers, your Family Office team will assist you with tax planning strategies and opportunities, cross border tax issues, tax compliance, and bookkeeping and reporting.

Our powerhouse team

Your personal team will forge a long-lasting relationship with you, your family, and your professional advisers, helping to develop the strategies to best support your aspirations and orchestrating the delivery of work efficiently and securely.

Two heads are better than one

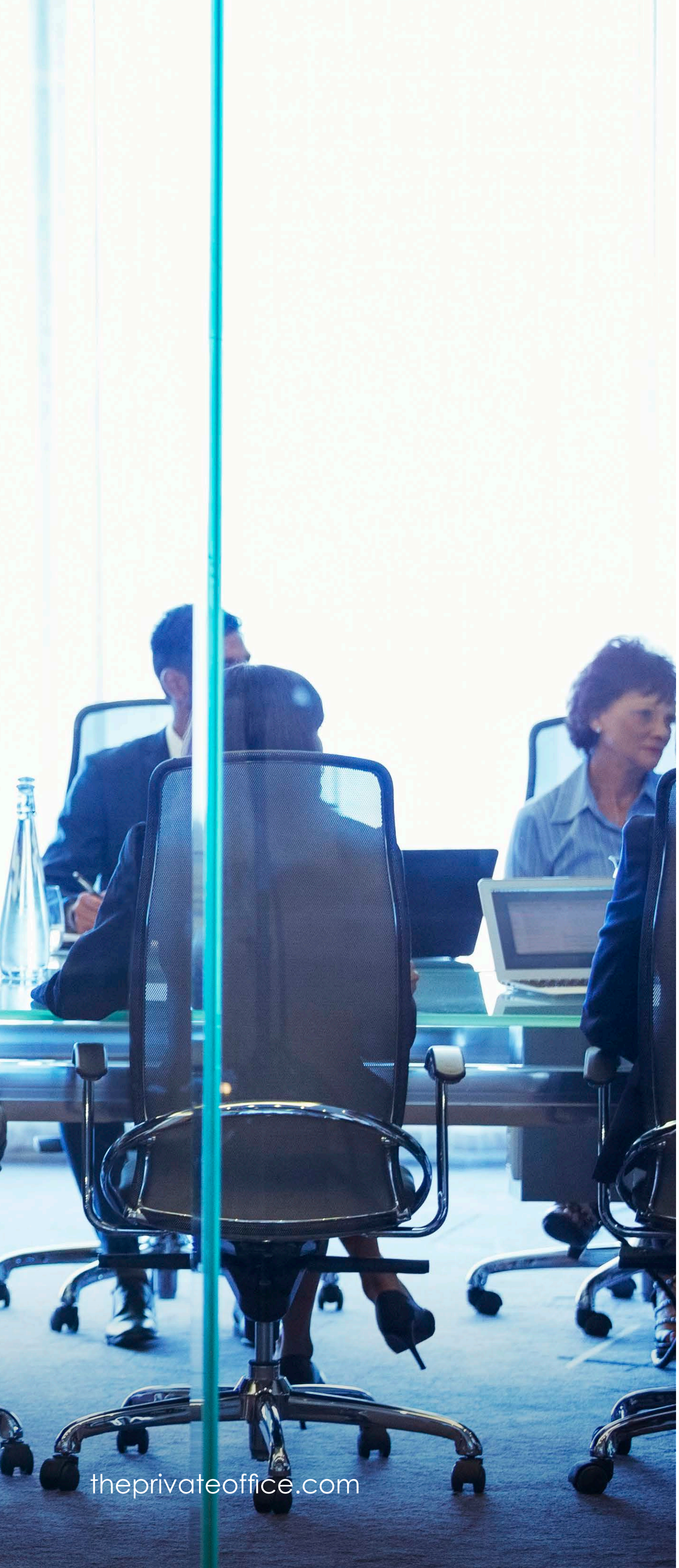
As a minimum, your team will include at least two of our highly qualified Financial Planners, one of whom will be a Partner.
In each case, your award-winning team will have the experience and established track record of working with clients in a similar position. They understand that confidentiality and security are incredibly important when dealing with a family's wealth.

Chartered specialist Advisers

The Advisers leading your team will be Chartered as standard and will often be qualified to a higher level with specialist technical expertise in the field of succession planning, the use of tax led investments, investment management, pensions and life insurance. We will work with your tax advisers to optimise the tax-efficiency of your financial plan.

Dedicated Client Delivery Associate

We understand the importance of fulfilling services impeccably. The administration and day-to-day management of your affairs will be coordinated by your Client Delivery Associate, an experienced member of our back-office team. You will come to know them as well as your advisers.



Investment expertise

Your investment plan will be unique and based on your goals and needs.

Unique to you

Your best interest is always at the heart of any advice we give so we may recommend that you continue to work with your existing investment managers, appoint a new external investment service (if you have specific investment preferences or where overseas regulation is a factor) or we may recommend our own investment services. We work for you and no-one else.

Investment solutions available include:

- A Personal Investment Portfolio(s) that has been built by the TPO Investment Committee to meet a specific investment mandate.
- Model portfolios provided by third party Discretionary Fund Managers
- Offshore products
- US centric portfolios
- Cash management and/or direct purchase of gilts
- Tax led investments
- Third party Discretionary Fund Managers for bespoke portfolio services
- Private Equity Funds

Using technology to enhance your experience

We pride ourselves on using technology to improve the way we deliver our services and make your financial life easier and more accessible.

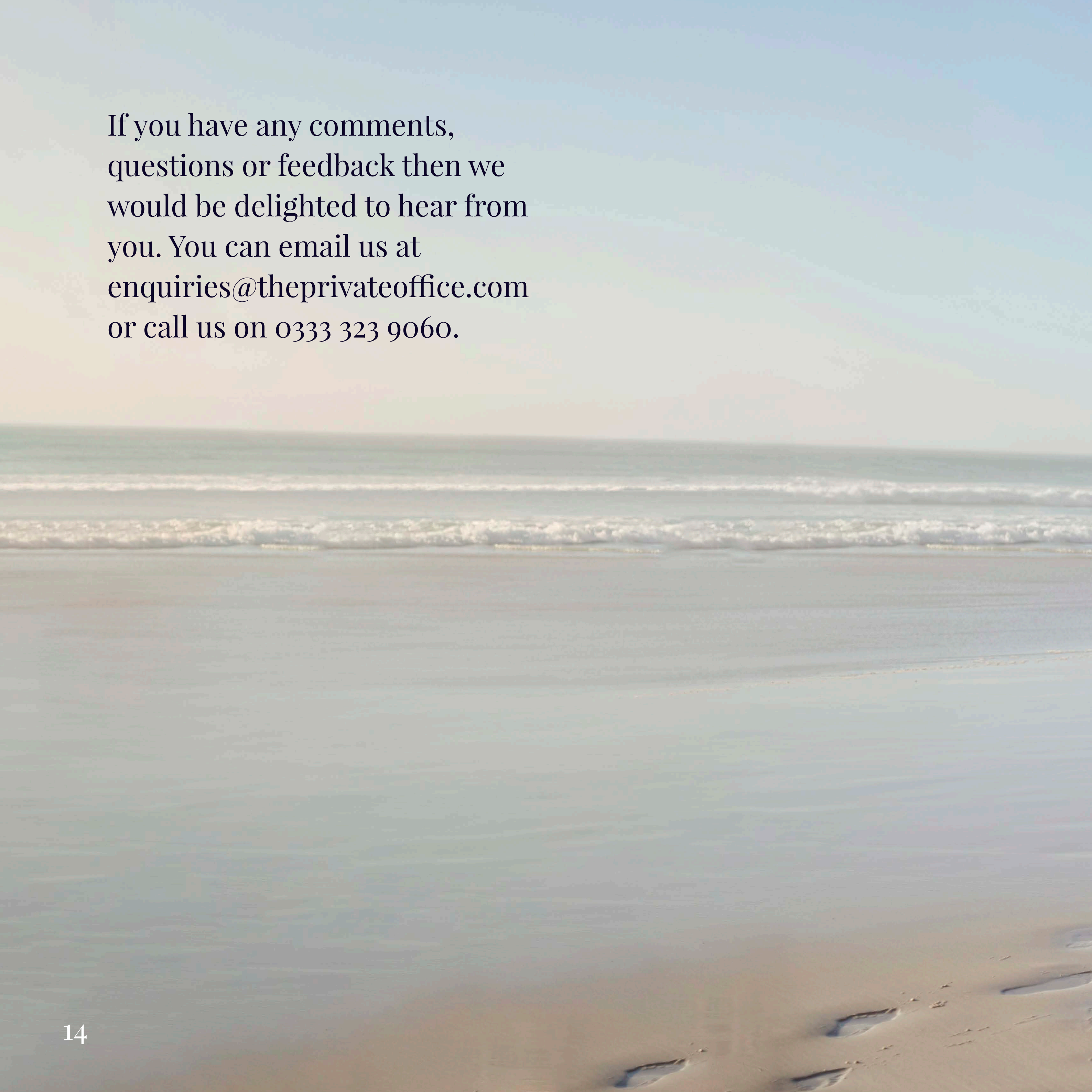
Speed and Efficiency

Our secure client portal, TPO Wealth, allows us to take advantage of the efficiencies and improvements that technology provides.

More efficient than post, more secure than email, you will be able to send encrypted messages to your TPO team and keep your important documents safely stored away for the future.

In addition to TPO Wealth, we and trusted external partners offer support and education around cyber security, family data and confidentiality.

- Chat to advisers via secure messaging
- Save and store important documents
- View investments in real time
- Share information between trusted professionals



If you have any comments, questions or feedback then we would be delighted to hear from you. You can email us at enquiries@theprivateoffice.com or call us on 0333 323 9060.

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Chartered Financial Planners