

1. What is the primary purpose of your business?

-

to serve clients and our people

Service

Education

Service

Wealth management

Make client outcomes even better

Advisory and consultative service

Helping people thrive

1. What is the primary purpose of your business?

Multi-family office; we serve the families in every way that touches their financial lives.

Unmatched client service

Financial services

Risk management

service

Help families with their biggest life challenges

Empowering families to thrive.

Enhance the lives of our clients and maintain wealth

Family purpose

1. What is the primary purpose of your business?

Education

Connect, Empower, Succeed

HR services

To provide value to family members

To serve clients

Knowledge

Wealth management and service

Understanding value

Improve behavior of client investment portfolios

1. What is the primary purpose of your business?

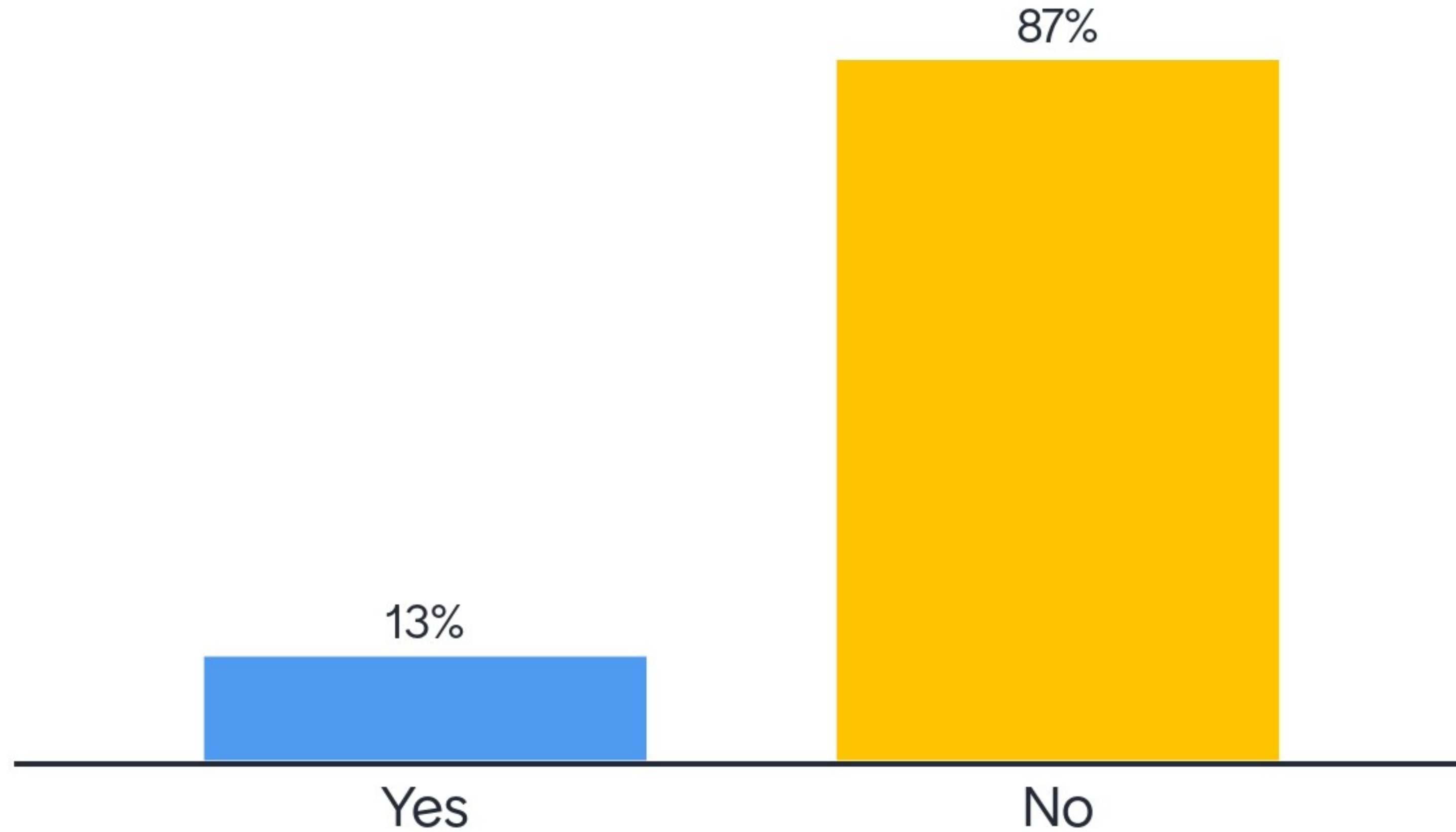
Wealth management and service

Improve how families use and maintain their family capital

Assist client to find their purpose

Nps

2. Is there a trade-off between delivering great outcomes for customers and great financial results?



3. What is the “North Star” metric you use to run your business?

Our core values

Bottom line - profit

Integrity

Excellence

Client retention

Do what is right.

Win with our people

Make a positive impact

Ethics

3. What is the “North Star” metric you use to run your business?

Integrity

Profitability

Integrity

Customer satisfaction

Client retention

Client retention

Honoring God

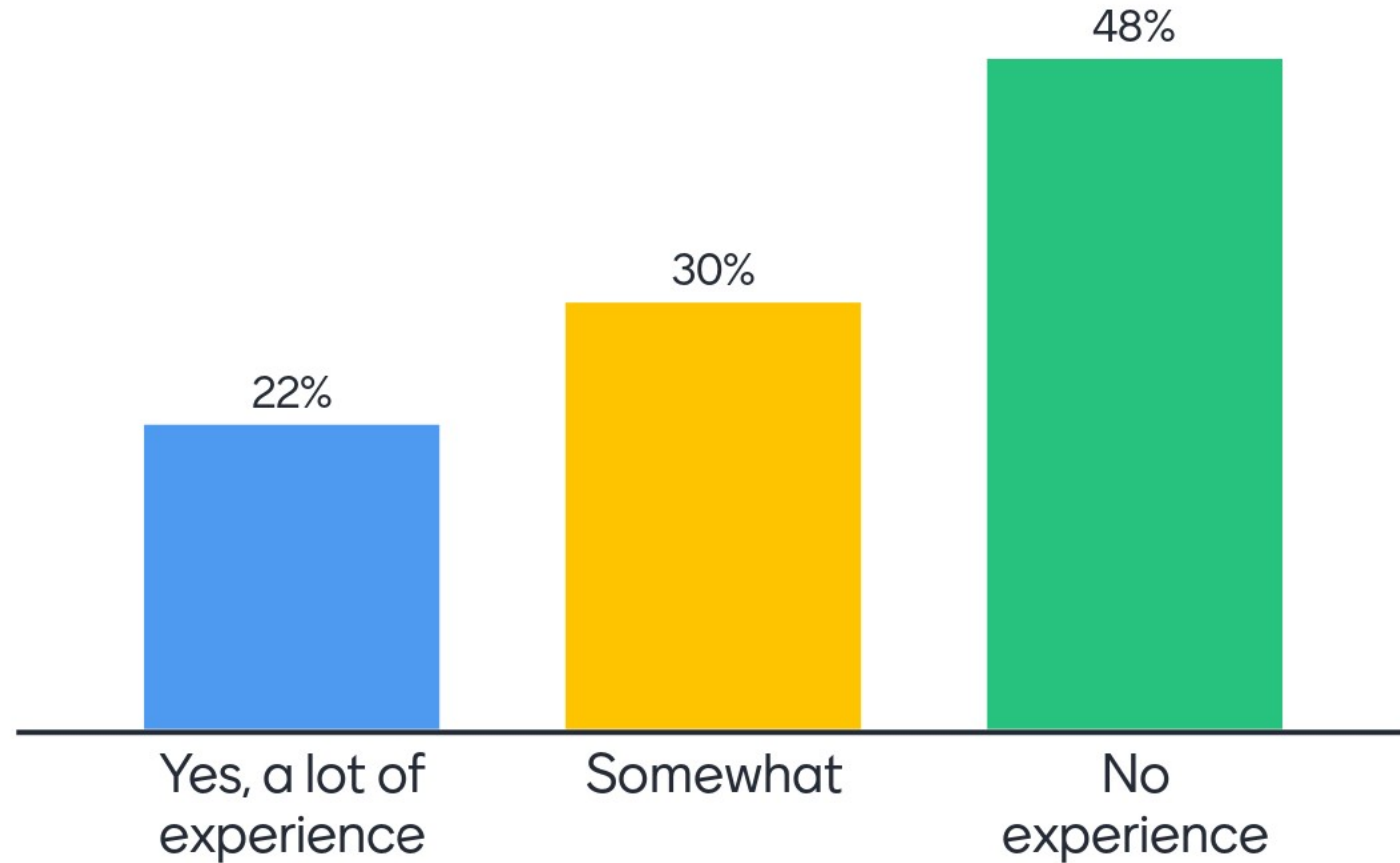
Client satisfaction

Member retention

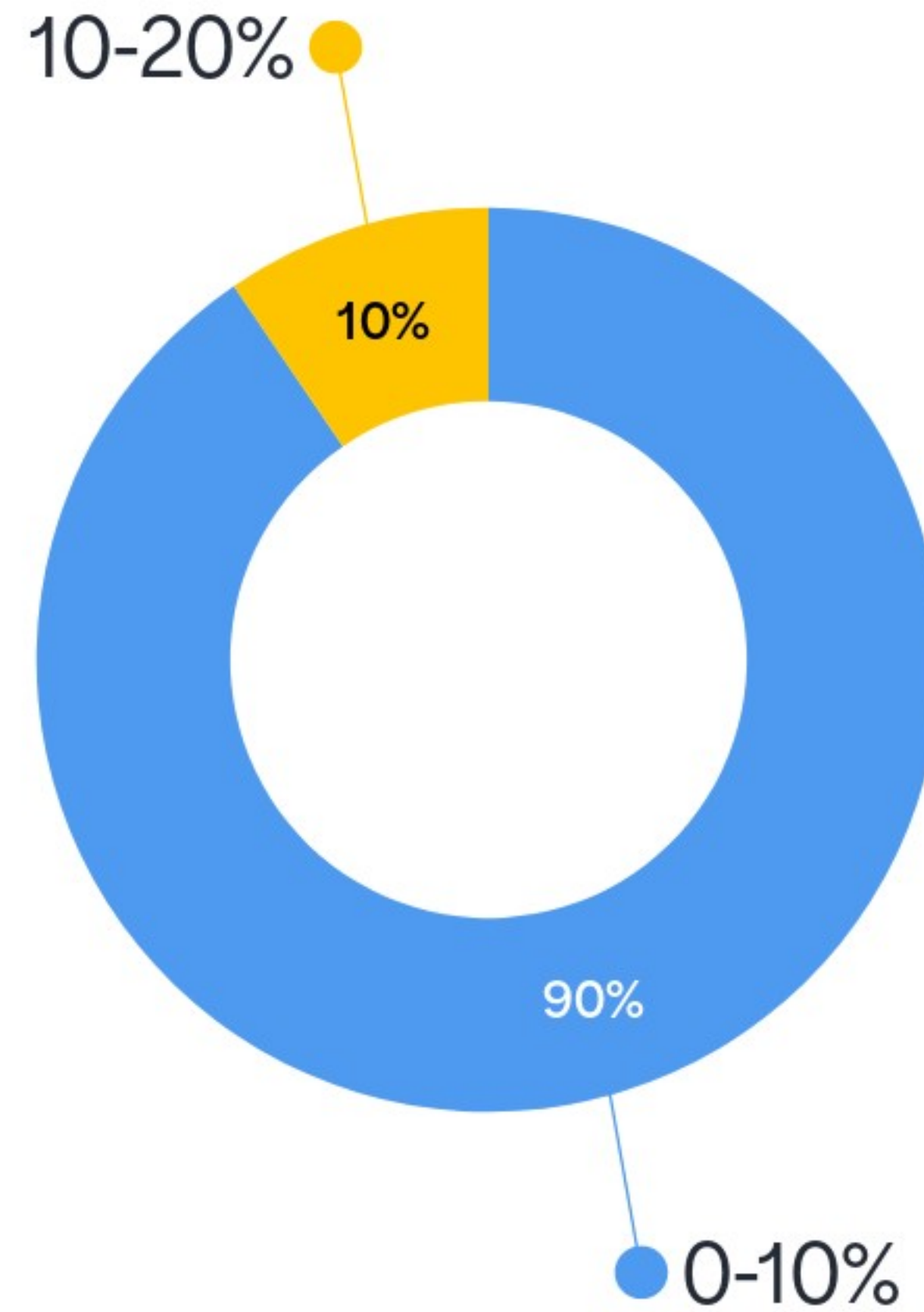
3. What is the “North Star” metric you use to run your business?

Integrity	Client satisfaction	Client satisfaction
Client feedback metrics	Unsolicited Referrals by clients and other advisors	-

1. Do you have experience working with Private Trust Companies?



1. What percentage of your clients are investing in blockchain or crypto?



2. What major theme pertaining to blockchain and crypto do you want to be more knowledgeable about?

