FAMILY OFFICE SERVICES

from Global Financial Private Client

A DETAILED APPROACH TO SERVING YOUR BEST INTERESTS.

At **Global Financial Private Client**, we believe an effective Financial Adviser must:

- Put his/her Clients' interests first
- Advocate for his/her Clients and not the "big company" for whom he/she works
- Take the time to build a personal relationship with his/her Clients

This is the basis of trust, upon which we then provide specific, individual life advice, aimed at allowing our Clients to sleep more comfortably.

Our decades of financial experience allow us to offer you the following through our Family Office Services: Wealth Management, Philanthropy, Estate Planning, Lifestyle Services, Reporting, Advanced Planning, Professional Network Management, Special Projects, Tax Management, Asset Protection, Successor Trustee Identification, and Risk Management.

With the **Family Office** model, our Clients can learn from each other and leverage that learning to put them ahead, no matter where they are in the life-cycle of wealth management. You get the benefits of a family network of services, but your information is safeguarded and your privacy and confidentiality protected.

Your Team, piloted by industry thought leader **Geoffrey A. Frazier**, has vast experience in representing a select group of influential families. He co-founded Global Financial Private Capital and personally trained over 450 financial advisers on "best practices" for helping their clients. This firm became one of the largest independent registered investment advisers in the country with over $6 billion of assets under management and including a Forbes Top 50 recognition[1]. The influential families that Mr. Frazier and the Team represented became the nationally known "best practice" within Global Financial Private Capital.

[1] https://www.forbes.com/top-50-wealth-managers/

HOW DOES FAMILY OFFICE DISCOVERY WORK?

Our highly personal, trust-driven approach to your financial wellbeing, starts with Discovery. **Discovery is listening;** we ask you important questions in six key areas, ensuring you feel valued, heard, and understood. These questions help us to identify potential gaps that may exist in your current and future plans. Our advice is more than financial. We aim to be there for you whenever life changes arise; to be your ‘first-call’ relationship.

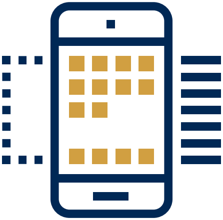
6 INPUTS (DISCOVERY)

Financials

Understanding current sources of income and the factors that may impact you in the immediate term along with the structure, registration, and location of assets and liabilities.

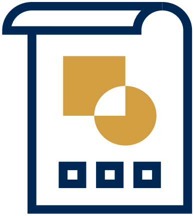
Goals & Critical Concerns

Understanding your personal and professional objectives as well as your future intentions for family and loved ones.



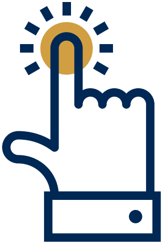
Interests

Identifying the activities, topics, and passions that interest you and occupy your time, attention, and money.



Process

Identifying how you prefer to be communicated with, the frequency and the level of detail you need to satisfy your sophistication and curiosity.



Professionals

Identifying and defining the roles of all the professionals that work with you on a regular basis. Defining status and their influence on your decision making process.

Relationships

Understanding which relationships are most important to you and what is the level of financial or emotional obligation they carry.

WHAT IS THE FAMILY OFFICE VALUE PROPOSITION; WHAT'S IN IT FOR YOU?

Closing gaps by delivering value. Our comprehensive gap analysis is based on your Discovery input and features a focus on twelve areas of output. This allows us to illustrate where we can provide the most value to you and close the largest gaps that may exist. This provides you with more clarity on where you are, but even more importantly, where you want to go.

12 OUTPUTS (VALUE)

Wealth Management

A combination of investment consulting, advanced planning, and relationship management. A refining of how we communicate with you and your other professionals.

Philanthropy

We help you express your goodwill to others by assisting you with the organization and distribution of funds you've set aside for humanitarian purposes.

Estate Planning

Make sure your money goes where you want it to go. We help you structure and design the future disposition of assets so that you can protect the children from themselves.

Lifestyle Services

Your family and finances are unique, so it makes sense to have a custom blend of services that are uniquely you. We provide access to concierge physician networks, future care planning, privacy and cyber protection advice, and more. All styled for your unique personal life goals.

Reporting

Regular reviews of investments, assets, and financial overviews communicated clearly and in a timely manner, so you're never left wondering what's going on with your money or questioning those you've trusted with it.

Advanced Planning

Enhance and safeguard your wealth with skillful regulatory and financial expertise. We help with repositioning and restructuring of assets to preserve and increase your wealth for the future.

Professional Network Management

Getting all your advisers on the same page, working together to understand and achieve your goals and objectives, saving you time and helping you reach clarity with decision making.

Special Projects

Big life events like retiring, buying a business, investing in a nontraditional asset. We help you plan, offer careful analysis or just let you bounce an idea. Take the risk; we'll try to make it safer to do something unexpected and exciting.

Tax Management

Moving money from income to short-term cap gains, to long-term cap gains, to tax deferral and ultimately, tax-free. That's an ongoing process that we know exists beyond December 31 and April 15.

Asset Protection

Implementing a risk management strategy to ensure your assets are safe and not unjustly taken.

Successor Trustee

Who knows you best, who will follow through with your clearly defined goals? We help you identify who the right choice is to carry on for you when your work is done.

Risk Management

Understanding your current exposure to catastrophic events minimizes the risks and gives you the least out-of-pocket outlay.

Global Financial Private Client's broad offerings include, but are not limited to, tax mitigation, asset protection, wealth management, lifestyle services and cash flow analysis. Our dedicated and experienced team of professionals can provide an array of services necessary for your family, from assistance with lending, risk management, special projects and banking matters to financial reporting, and more, making for the customized, personalized family office.

We look forward to **Discovering** the customized benefits our **Family Office** approach may bring to you.

IMPORTANT INFORMATION

Investment Advisory Services provided on a fee basis by Global Financial Private Client, an SEC Registered Investment Adviser.

Please remember that past performance may not be indicative of future results. Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment, investment strategy, or product (including the investments and/or investment strategies recommended or undertaken by Global Financial Private Client, LLC ("GFPC"), or any non-investment related content, made reference to directly or indirectly in this newsletter will be profitable, equal any corresponding indicated historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. Due to various factors, including changing market conditions and/or applicable laws, the content may no longer be reflective of current opinions or positions. Moreover, you should not assume that any discussion or information contained in this brochure serves as the receipt of, or as a substitute for, personalized investment advice from GFPC. To the extent that a reader has any questions regarding the applicability of any specific issue discussed above to his/her individual situation, he/she is encouraged to consult with the professional advisor of his/her choosing. GFPC is neither a law firm nor a certified public accounting firm and no portion of the brochure content should be construed as legal or accounting advice. A copy of the GFPC's current written disclosure Brochure discussing our advisory services and fees is available upon request. Please Note: If you are a GFPC client, please remember to contact GFPC, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. GFPC shall continue to rely on the accuracy of information that you have provided.

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