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Family Office Exchange Adds Three New Firms to List of Leading Wealth Advisors

FOX continues process of identifying providers of integrated wealth advice

CHICAGO, November 8, 2012 – Family Office Exchange (FOX), a global counselor on matters of managing family wealth, today announced the addition of The CAPROCK Group, Commerce Family Office and Geller Family Office Services LLC to their list of Leading Wealth Advisors (LWA). The list identifies firms that have passed a comprehensive screening to assess their ability to deliver integrated wealth advice to families with more than \$20 million in investable assets.

The CAPROCK Group has offices in Boise, Seattle, and San Jose; and serves 75 family clients with \$1.5 billion in assets under advisement (AUA). Missouri-based Commerce Family Office serves 75 family clients with \$6.5 billion in AUA. New York-based Geller Family Office Services serves 37 family clients with \$5 billion in AUA.

“These additions are part of an ongoing process to identify and compile a comprehensive list of firms capable of delivering integrated wealth advice to families with more than \$20 million in investable assets,” says FOX Founder and CEO Sara Hamilton. “Financially successful families have more complex needs that require the expanded capabilities of an integrated wealth advisor.”

To date, the Family Office Exchange has screened more than 40 firms and identified 33 qualified organizations. FOX evaluates firms based on 10 criteria that have been derived from years of industry research and consulting experience. The screening assesses whether firms possess the financial strength, management experience, business model, and resources necessary to provide a full range of integrated wealth advice to families, including investment management, tax planning, estate planning, philanthropy, and owner education. The list of criteria is available at www.familyoffice.com/advisor-directory/leading-wealth-advisors/screening-criteria.

“We are continuously screening new firms and encourage any interested advisors to contact us for consideration,” adds Hamilton. “Our goal is to aid wealth owners in their search for qualified advisors and make this list the starting point in researching firms capable of meeting their needs.”

The web traffic statistics speak to the popularity of the LWA listing with nearly 4500 unique visitors since the May launch.

The full list of advisors is available at www.familyoffice.com/advisor-directory/leading-wealth-advisors. Firms interested in being screened for the list can inquire at www.familyoffice.com/advisor-directory/leading-wealth-advisors/screening-inquiry.

About Family Office Exchange

[Family Office Exchange](http://www.familyoffice.com) supports a global member network of wealthy families and their advisors who are pursuing best practices for optimal management of their families' wealth and legacy. The community includes over 6,000 people from 650 organizations in 20 countries who utilize FOX's resources each year for advice, networking, education, and comparative metrics.

FOX is headquartered in Chicago and London, with offices in New York and Boston. For more information about FOX, call 1.312.327.1200 (The Americas) or 44.(0)20.7520.9443 (Europe, Africa, Asia/Pacific) or visit www.familyoffice.com.

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