



Annual Service Calendar Platinum Tier (Legacy Level)

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- Client Profile:** High-net-worth households, family offices, and multi-generational families with complex financial needs.
- Engagement:** Quarterly in-person or virtual strategy sessions + continuous coordination.
- Primary Focus:** Wealth preservation, strategic coordination, legacy and estate planning, and family governance.
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Quarter 1 (January – March)

Theme: Strategic Alignment & Multi-Entity Coordination

Objectives:

- Conduct full household financial and estate review.
- Align investment, tax, and philanthropic strategies for the year.
- Meet with external advisors (CPA, attorney, trustees) for integration.

Deliverables:

- Annual Family Strategy Session (2 hours, in-person or virtual)
- Consolidated Household Financial Report
- Updated Investment Policy Statement (IPS)
- Multi-Advisor Coordination Summary

Client Touchpoints:

- *"Annual Strategy Kickoff" briefing*
 - *Invitation to private market or economic outlook event*
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Quarter 2 (April – June)

Theme: Risk, Succession, and Business Continuity

Objectives:

- *Review business succession and continuity plans.*
- *Evaluate estate and trust structures for efficiency.*
- *Conduct full insurance and liability audit.*

Deliverables:

- *Business Continuity & Succession Plan Update*
- *Advanced Risk and Insurance Report*
- *Estate Document Coordination with Attorney*

Client Touchpoints:

- *Quarterly strategy meeting*
 - *Family governance or next-generation education session*
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Quarter 3 (July – September)

Theme: Investment Oversight & Philanthropic Strategy

Objectives:

- *Conduct deep investment performance review and rebalancing.*
- *Evaluate private investments and alternative holdings.*
- *Review charitable giving and philanthropic impact.*

Deliverables:

- Quarterly Investment Oversight Report
- Alternative Investment Summary
- Philanthropic Impact Report or Foundation Review

Client Touchpoints:

- Quarterly market update call
 - Invitation to exclusive client event or roundtable
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Quarter 4 (October – December)

Theme: Year-End Optimization & Legacy Planning

Objectives:

- Implement year-end tax and estate strategies.
- Conduct family meeting to review legacy goals and governance.
- Set next year's strategic objectives.

Deliverables:

- Year-End Family Office Review Meeting (2 hours)
- Consolidated Annual Report (financial, investment, tax, and estate summary)
- Updated Family Mission & Governance Statement
- Next-Year Strategic Plan

Client Touchpoints:

- Personalized “Year-End Legacy Briefing”
 - Invitation to annual client appreciation dinner or retreat
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Ongoing (Throughout the Year)

Support & Communication:

- *Dedicated advisory team and family office liaison*
- *Continuous coordination with CPA, attorney, trustees, and bankers*
- *Concierge-level access for urgent needs or opportunities*
- *Secure multi-entity reporting dashboard*
- *Quarterly newsletters and exclusive insights*

Service Summary Snapshot

Category	Frequency	Deliverable
Financial Plan Review	Quarterly	Dynamic multi-entity plan
Investment Oversight	Quarterly	Custom household reporting
Tax & Estate Coordination	Continuous	Integrated advisor collaboration
Business Succession	Annual	Updated continuity plan
Family Governance	Semi-annual	Family meeting facilitation
Client Meetings	4+ per year	Strategy and family sessions
Education & Communication	Continuous	Exclusive insights, events, and updates



“As a Platinum Tier client, you receive a fully integrated advisory experience — from investment oversight to legacy planning. Our dedicated team coordinates every aspect of your financial life, ensuring your wealth supports your family’s purpose and vision for generations.”