Our Financial Concierge serves as your Family CFO.

Our Financial Concierge is an unbiased and unaffiliated resource selling no products. We deliver financially focused solutions to individuals and families so they may better manage their financial life. Working along-side a family's advisors, we further assist with understanding, decision-making and implementation.

USING A FAMILY CFO

Situations and circumstances vary from family to family. Typically, a Family CFO is most useful when:

- a spouse can no longer handle the family's financial affairs
- a family experiences change resulting from a death, a marriage, a job change or retirement
- a family is transitioning the finances of its elderly parents
- a change in financial products is needed
- a family needs relief from everyday financial record-keeping
- preparing for wealth transfer is needed

No one needs a Family CFO. But, having one alleviates frustration, time constraints and distrust.

PROJECT SPECIFIC

Our Financial Concierge helps families complete various projects, some of which include:

- finding a mortgage loan and implementing the transaction
- account reconciliation
- set-up online banking and bill-pay services with training
- bring a spouse / partner up to speed on the family's financial affairs
- fill out a personal financial statement
- credit report clean-up
- complete a transaction
- organize financial record-keeping
- selecting an advisor
- "tax-time" preparation

Compensation is not related to a product. Our Financial Concierge is paid based on an hourly rate.

A FAMILY CFO IS THE:

- Financial Interpreter
- Dumb-Question-Answerer
- Bad Cop
- Solution Locator
- Idea Wall
- Gut-Checker

All financial decisions are personal. A Family CFO helps you reach the place where you are comfortable making a decision or completing everyday tasks.

Loyalty is to the family not the product.

To contact your own Family CFO, call Becci Hall at:

515-208-5706 or email at **beccihall@mchsi.com**