HARRIS myCFO®

A Knowledge of Wealth™

Integrated wealth management with independent investment advisory services and the comprehensive capabilities of a multi-family office.

Integrated Wealth Management

Significant, and often sudden, wealth brings with it many opportunities to enjoy a lifestyle that is independent, self-directed, and secure. But great wealth can also bring great complexity and risk. From the moment wealth is acquired, new challenges emerge. Important decisions need to be made. They can quickly become complex and often confusing, with a myriad of interconnected consequences.

Gaining expertise in any one of the many financial aspects of wealth in order to make informed decisions often requires the assistance of several financial and legal advisory professionals from multiple firms with varying degrees of proficiency, accountability, and advocacy. Managing great wealth can quickly become a daunting and time consuming effort with many accounts, reports, expenses, fees, and more decisions.

Many families choose to take on these challenges one by one with numerous advisors, some establish private offices — wholly owned entities set up to oversee and manage their wealth. Some choose to hire multi-family offices — organizations that manage a mix of services for multiple families. Others choose Harris myCFO, a unique integrated wealth management resource for affluent families and individuals.

Our ability to provide the broadest range of services in an integrated manner with complete oversight and reporting ensures you will have a comprehensive snapshot of your wealth without the complexity, cost, or concerns that may arise from having to work with multiple firms and reporting tools.

A Full Suite of Family Office Capabilities

Our singular goal is the advocacy of our clients' interests in all wealth matters, and because our only compensation comes from clients, there are never any competing interests. Unlike many firms that require you to buy a mix of their own investment products, we do not, allowing us to remain independent and objective in our investment advice. And, because we provide a full range of family office services, our clients work with a lead advisor backed up by a team of service professionals with deep knowledge and insight.

- **Investment Advisory:** Transparent, unconflicted advice and a top-tier open architecture investment platform.
- **Tax Planning:** Planning and preparation capabilities that fit your wealth needs.
- **Financial Reporting and Expense Management:** Day-to-day management of all your financial obligations.
- **Estate and Trust Advisory:** Expert planning for the orderly and efficient transfer of wealth.
- **Risk Management and Insurance Advisory:** Ensuring proper wealth protection from liability and risk.
- **Philanthropic Planning:** The extension of your vision, values, and passions through programs and gifting.
- **Family Education:** Informing, protecting, and empowering your entire family.
- **Capital Advisory Services and Custom Banking:** The ability to leverage and maximize your assets to the fullest.

Getting Started with Harris myCFO

Time is often a critical factor in preparing for, and managing wealth opportunities. If you face a near term liquidity event that may lead to significant wealth, you should consult a Harris myCFO professional prior to the event or as soon as possible.

These may include a business transaction such as an IPO, stock transaction, sale of a business, or a personal event such as retirement, inheritance, divorce, or other legal settlement.

We can ensure you benefit by using an integrated approach, from the initial safe keeping of your liquid assets, to the personalized strategy and plan we develop with you to meet your goals and lifestyle objectives.

Contact one of our professionals in any of the offices listed below and we will be happy to provide you with more detailed recommendations on how to best protect, manage, and grow your personal wealth.

Uniquely Qualified to Serve Clients:

- Harris myCFO is part of BMO Financial Group, the twelfth largest financial group in North America, founded in 1817 with over $413 billion in total assets and 45,000 employees.
- Harris myCFO has over 130 multi-disciplinary professionals in offices across the United States.
- Harris myCFO has nearly 20 billion in assets under advisement.
- Harris myCFO typically serves clients with investable assets of $25 million or more or net worth of $100 million or more.
- Harris myCFO has over 250 client and family relationships.
- Harris myCFO is recognized by *Forbes* as one of the top ten financial advisors for 2011.
- Harris myCFO is recognized by *Financial Planning* as "one of the world's most elite independent investment advisory firms for high net worth investors."

Harris myCFO Offices

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