

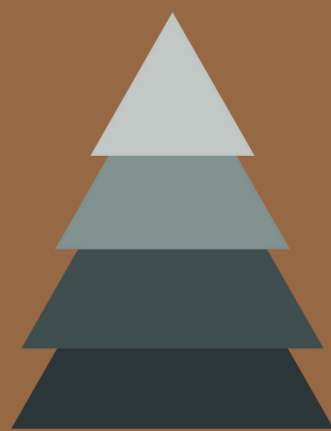


partner guide 2024

FLEXIBLE FUNDING: PARTNER
OR HOUSEHOLD PAY OPTIONS

Total Family
Management

phases of partnership



1 ALIGNMENT

The firm recognizes the importance of family dynamics, committing to a definition of wealth that includes well-being beyond financial assets.

2 EXPERIENCE

Executives personally engage with TFM coaching, ensuring its effectiveness and leading by example before client recommendations.

3 VALIDATION

A select group of willing and excited VIP households pilot TFM's program, providing initial feedback to guide the program's effectiveness.

4 BLUEPRINT

The firm and TFM develop a bespoke plan to integrate family coaching into the client journey, aligning with the firm's unique ethos.

5 ROLLOUT

TFM's offerings are gradually introduced to more clients, with the rollout refined through ongoing evaluation and client insights.

TFM essentials

EIGHT 90-MINUTE WORKSHOPS

Tailored to the family

DEDICATED FAMILY COACH

Objective support and guidance

RELATE

Family Legacy Software



\$2,495
PER HOUSEHOLD

TFM Essentials is a comprehensive program centered around family development and growth. It's uniquely tailored to each household, combining practical workshops and impactful family coaching with the innovative RELATE platform.



01 WELCOME	02 ROLES	03 VALUES	04 PURPOSE	05 DYNAMIC	06 DYNAMIC	07 DYNAMIC	08 DYNAMIC
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COMMON LANGUAGE: FAMILY VISION



KEY FEATURES: PRIVATE, 90-MINUTE VIRTUAL WORKSHOP | PROPRIETARY RELATE HOUSEHOLD MANAGEMENT SOFTWARE | SESSIONS LED BY EXPERIENCED TFM COACHES | FLEXIBLE SCHEDULING: WORKSHOPS ARRANGED AT YOUR CONVENIENCE.

PARTICIPANTS & TERMS: ATTENDED BY HEAD(S) OF HOUSEHOLDS | PAID BY PARTNER FIRMS OR DIRECTLY BY THE FAMILY | BILLED AT ENROLLMENT.

ongoing support membership

RELATE HOUSEHOLD MEMBERSHIP

Upon completion of the TFM Essentials workshops, families can renew their RELATE subscription on an annual basis. The renewal and additional coaching options ensure that families continue to benefit from TFM's resources, maintaining and furthering the progress achieved during the Essentials program.

\$199/ ANNUALLY

ongoing support workshops

ACTIVE MEMBERSHIP REQUIRED

SINGLE WORKSHOP

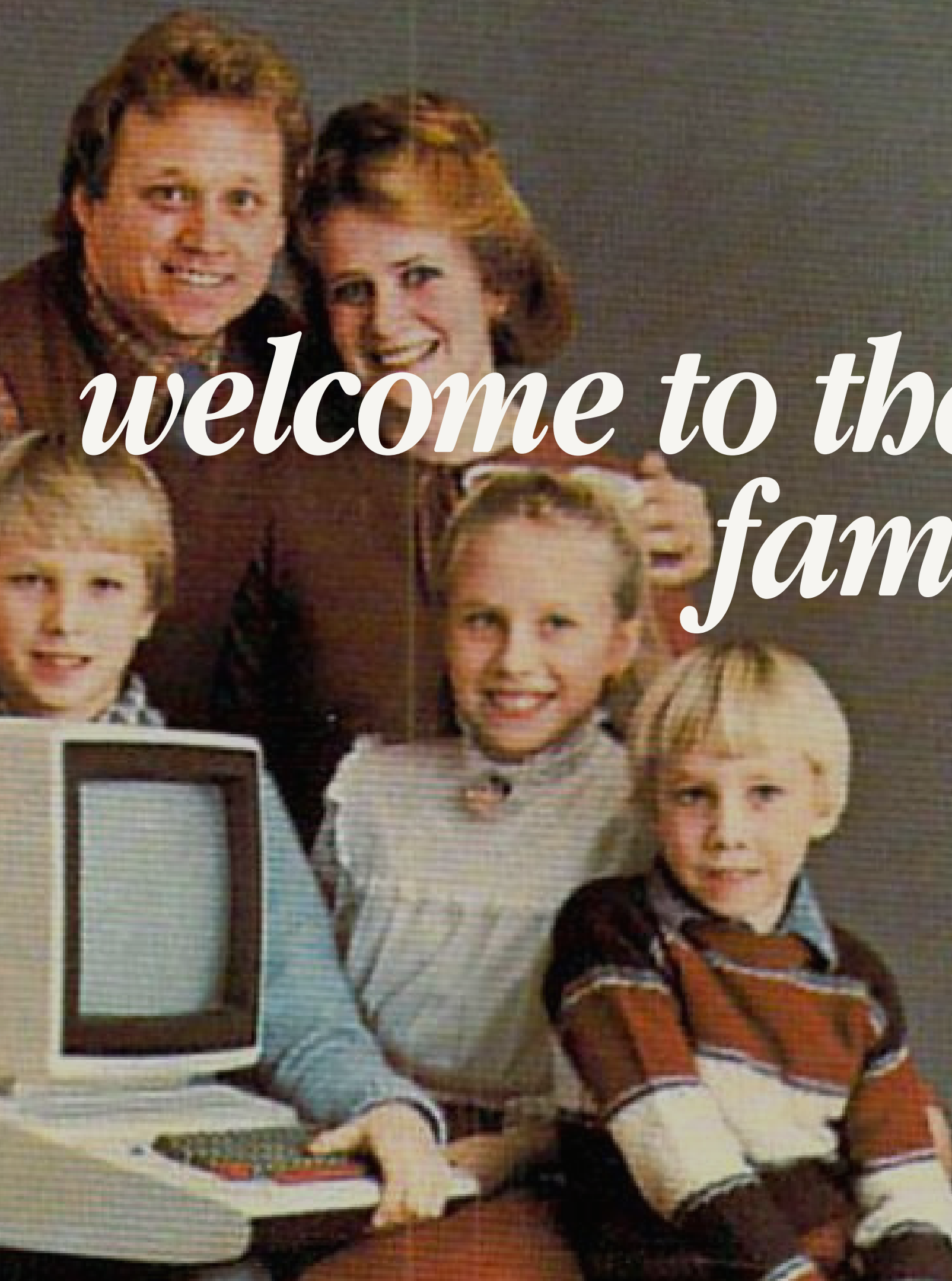
One 90-minute Workshop Family Driven
Dedicated Coach Memorialized in RELATE

\$349

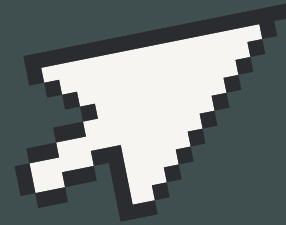
FOUR WORKSHOP BUNDLE

Four 90-minute Workshops Family Driven Discounted Pricing
Dedicated Coach Memorialized in RELATE

\$1,196

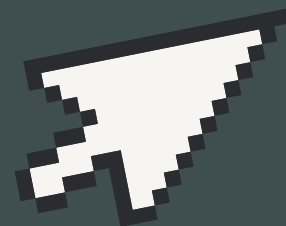


*welcome to the
family*



PRIVATE FAMILY COACH

Workshops led by empathetic, talented, well-being professionals



RELATE

Software built to enhance client experience & track legacy



SOCIAL FITNESS

Turn key solution to add Family Dynamics to your MFO