

An aerial view of a dollhouse with several rooms. People are visible inside, including a person in a red shirt in a living area, a person in a white shirt in a kitchen, and a person in a dark shirt in a bedroom. The dollhouse has a blue roof and white walls.

partner guide 2024

FLEXIBLE FUNDING: PARTNER
OR HOUSEHOLD PAY OPTIONS

Total Family
Management

TFM essentials

SIX 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 platform.



01

WELCOME

02

VALUES

03

PURPOSE

04

ROLES

05

DYNAMIC

06

DYNAMIC

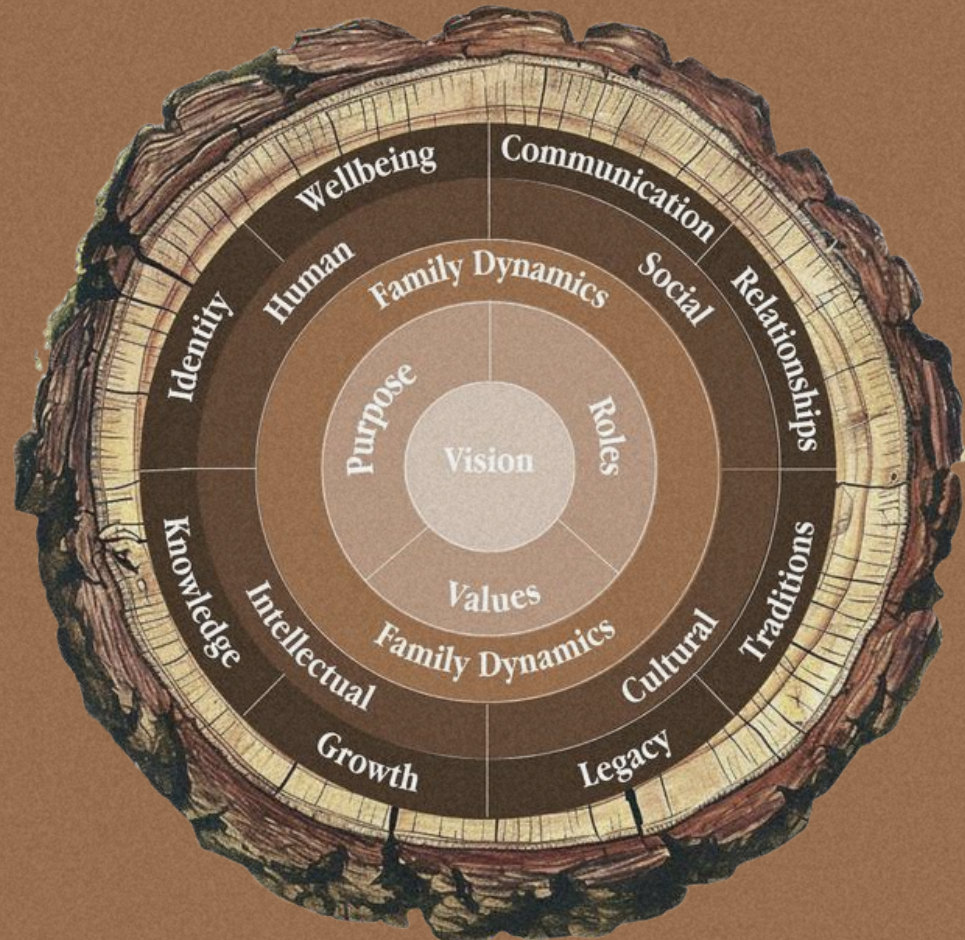
COMMON LANGUAGE: FAMILY VISION

DEDICATED
FAMILY COACHING

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

PARTICIPANTS & TERMS: ATTENDED BY HEAD(S) OF HOUSEHOLDS

tiers of partnership



1 **DISCOVERY**

Initiate a cultural shift towards defining wealth as well-being, aligning your firm's values with Wealth 3.0 principles under TFM's guidance.

2 **MOMENTUM**

Firm initiates pilot with TFM involving advisors and/or clients, begins to use TFM software and resources.

3 **TRANSFORMATION**

Firm expands rollout, creates customized marketing materials, and schedules extensive Wealth 3.0 education for advisors, increased software functionality.

4 **PREMIER**

Highest partnership level, enhanced marketing and technology support, continuous client and advisor education, and strategic partnership opportunities expanded.

tiers of partnership benefits

PARTNERSHIP BENEFITS	DISCOVERY	MOMENTUM <i>PILOT PHASE</i>	TRANSFORMATION <i>15+ HOUSEHOLDS</i> <i>FIRM PAID</i>
MARKETING SUPPORT FOR ADVISORS (MESSAGING + CUSTOM COLLATERAL)		✓	✓
PARTNER ADMIN + CLIENT TRACKING			✓
CUSTOMIZED INVITATIONS + RESOURCES			✓
CLIENT WELCOME BOX + GIFTS			✓
ACCESS TO VP OF ENGAGEMENT FOR ADVISOR EDUCATION			✓

ongoing support membership

RELATE HOUSEHOLD MEMBERSHIP

Upon completion of the TFM Essentials sessions, families can renew their subscription. 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 sessions

ACTIVE MEMBERSHIP REQUIRED

SINGLE SESSION

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

\$349

FOUR SESSION

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

\$1,196