The Family CFO™

Private Wealth Advisers

Capital Partners

About Capital Partners
Private Wealth Advisers

"We help our clients get their entire financial house in order and keep it that way for the rest of their lives. We ensure that every decision they make is aligned with their most important goals and deepest values."

Capital Partners works with a limited number of clients to ensure they receive a high level of personalised attention. Our wealth consulting process results in a thorough strategic plan, unique for each client and we provide a step-by-step action plan to ensure things happen.

In every aspect of our work, we make an uncompromising commitment to providing world-class service and to having a significant, positive impact on our clients' well being.

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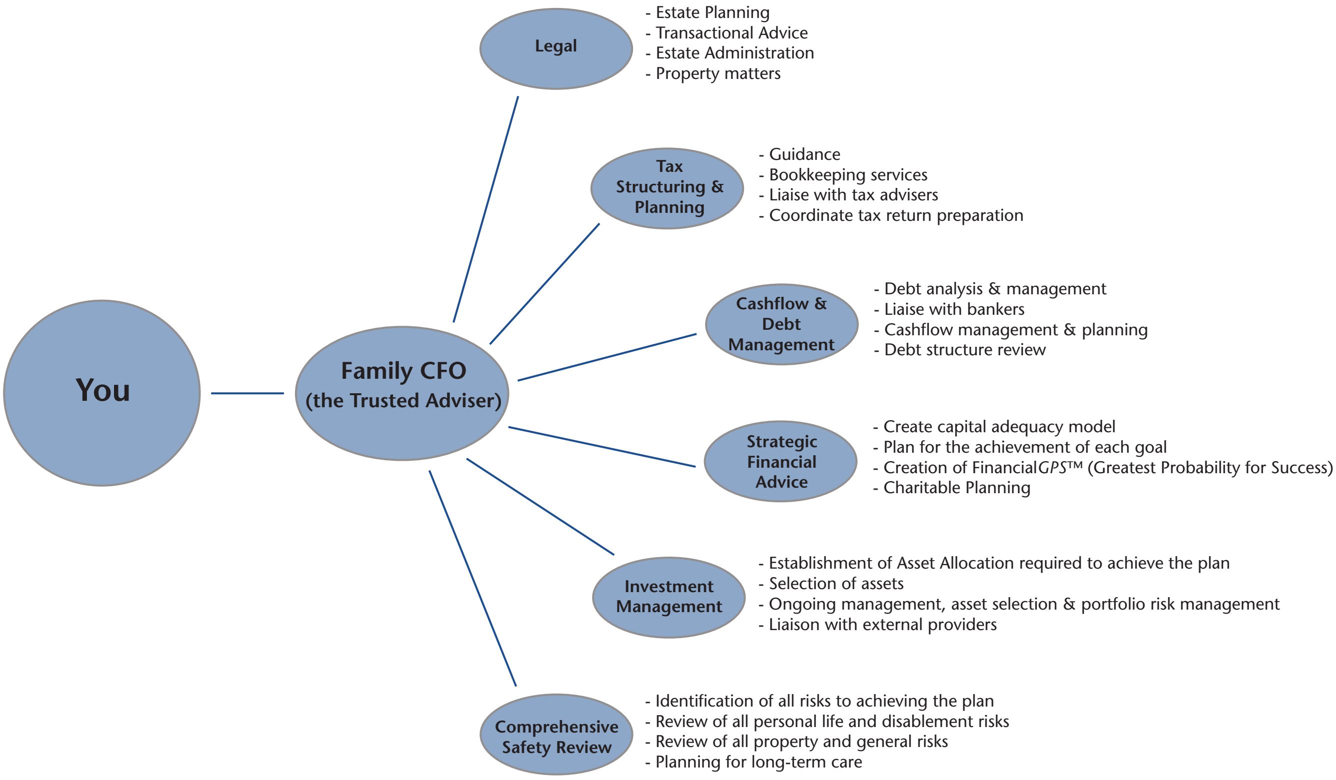
The FamilyCFO™ is the experienced guide and mentor, keeping an eye on the big picture, while also taking care of the detail. Our primary role is to help you steward your financial resources to achieve financial and personal well-being.

We give our clients the gift of clarity and time.

Helping you get your financial house in order needs a thorough systematic approach. Your Financial*GPS*™ (Greatest Probability for Success) lists every action item necessary to achieve long term success. We coordinate the process for you.

The FamilyCFO™ model is a comprehensive, integrated approach that draws from best practices in a variety of fields to fulfill your needs as completely and effectively as possible.



Who benefits most from what we do?

Success leaves subtle clues. The clients who benefit most from our services have the following qualities:

- THEY ARE INTERESTING PEOPLE: Our clients are interesting people with things in life that are more important than money.
- THEY ARE FINANCIAL DELEGATORS: Our clients are financial delegators. They appreciate, and are willing to follow, the advice of an expert.
- THEY ACHIEVE THEIR GOALS: Our clients appreciate the clarity and peace of mind of knowing they have the greatest probability of achieving their goals.
- THEY ENJOY SIMPLICITY: Our clients enjoy the simplicity and freedom that comes from having all their financial assets under the watchful eye of a single trusted adviser.
- THEY VALUE OUR WORK TOGETHER: Our clients are comfortable with our fee structure and value the work we do together.
- THEY FOCUS ON WHAT'S IMPORTANT: Our clients value our relationship. By delegating, they can focus their valuable time and energy on those things in life that are most important to them.
- THEY CAN HANDLE THE TRUTH: Our clients want to hear the truth from us regarding their financial situation... no matter what.

Our Key Deliverables

1. **Annual update of the Financial Roadmap®.** Each year we complete a thorough update of your Financial Roadmap® focusing on your values and most important goals. This provides clarity around priorities and progress and links into your lifetime financial model.

2. **Financial*GPS*™ (Greatest Probability for Success)**. The FinancialGPS™ is a comprehensive list of recommendations and action items required to give you the greatest probability that you will stay on track to achieve your goals, and to ensure your entire financial house is in order.

3. **Clear Progress Reports.** Each time we meet we will provide clear reports designed to show your progress benchmarked against your objectives.

4. **Investment Management.** Our specialist team will advise on asset allocation and specific investment selection to best position your investment assets on an ongoing basis.

5. **Tax Management.** We help our clients plan to limit any unexpected surprises from the tax office. We project manage the completion of all tax returns and work closely with tax professionals to achieve appropriate outcomes.

6. **Estate Planning.** Each year we review and update your estate plan to reflect any changes in your life, with a full and focused legal review every five years. We provide a clear plan for your money for the next generation, and plan to ensure your heirs work together, preventing conflicts about money.

7. **Cash-flow & Debt Management.** We will develop a cash-flow management plan to ensure the appropriate levels of funding go towards achieving your important goals, while maintaining lifestyle today. This incorporates a debt management plan to ensure any debts are paid down in an appropriate timeframe.

8. **Comprehensive Safety Review.** Our team will assess all threats we see to the achievement of your plan. This includes all personal, occupational, life, disability and critical care risks, along with all property risks.

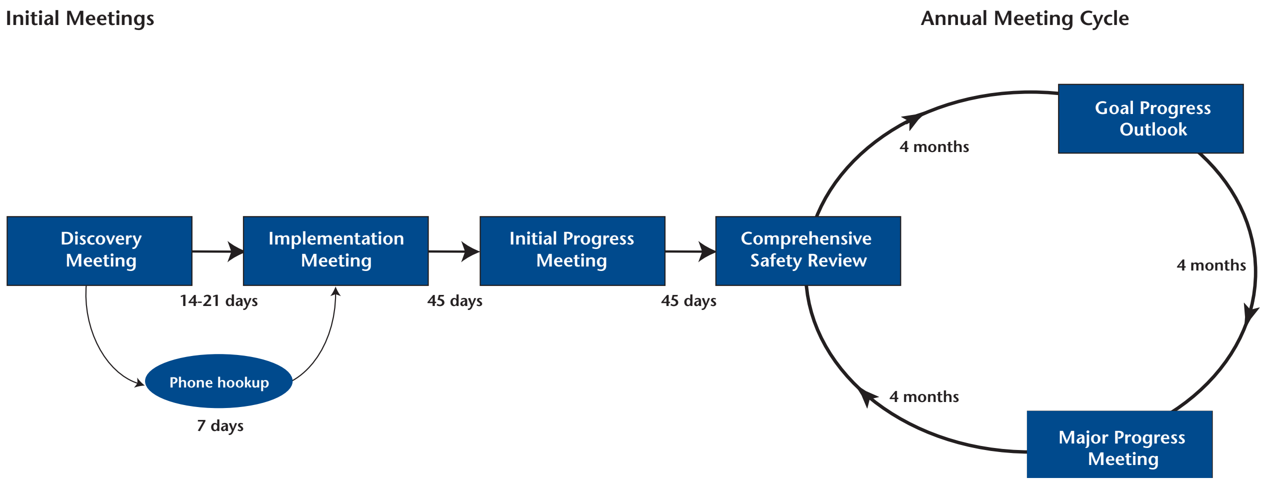
9. **Project Management.** Our team will project manage the engagement of all external advisers for accounting, tax, legal, insurance, stock-broking and ensure advice is followed up in a timely manner.

10. **Trusted Adviser.** We will leave no stone unturned to ensure you your financial strategy is sound, comprehensive and aligned to your values and goals. We will be your first point of call on any matter relating to your plan and we will tell you the truth, no matter what.

Making it happen

Working with a small community of clients affords us the opportunity to really stay on top of our clients' financial issues, and to meet with them as often as necessary.

Our Three Meeting Process ensures that we meet at regular four-monthly intervals to cover all of the deliverables we promise, and that our team is exceptionally well prepared for each meeting. Additional meetings can be set at any time to handle specific issues.



As the FamilyCFO™ we deliver:

Leadership and Direction - understanding what matters most and then creating a plan with accountability to make things happen;

Capability and Expertise - ensuring there is no financial issue a family will face that we cannot solve or source a solution for, through our network of experts;

Confidence and Trust - so that you have the confidence that everything that needs to be done, is being done; and

The Gift of Clarity and Time - so that you can relax and enjoy life.

Capital Partners

Successful People. Smart Decisions.®