



DISCOVER Calgary's Family Office

Gain Control Over Net Worth

For individuals and families with incomes over \$750K per year or a net worth in excess of \$10 million.

The Oversight Gap

The strategic oversight of a large, complex and multi-generational estate requires the broadest financial skill set, the greatest understanding of a family's situation and goals, and the most onerous and on-going commitment of time.

Unfortunately, most families are still managing this responsibility on their own. Given how complex the challenge and how busy people are, things get missed, coverage gets out of date, excess fees are paid and anything that is not urgent tends to get neglected until it becomes urgent.

Why?

Because no one is tasked to advise and support families on an on-going net worth basis. Existing advisors largely handle tasks, projects, products and compliance related matters on a case by case basis. The big picture oversight is left to the family to direct and manage on their own.

Families are often unaware of everything they need to consider and manage and are typically too busy to stay on top of everything, even if they are keenly interested and qualified. There is simply too much to know and do for most people to stay on top of net worth management on their own.

The Family Office Solution

A family office helps families gain complete control over their net worth, without needing to become financial experts or dedicating their lives to managing their net worth. Our role is to guide and support families in setting clear and specific goals. We help them establish policy; address gaps; update the outdated; provide meaningful aggregate reporting; provide non-product advice and more.

Call **403.231.1936** for details

Watch our 90 second video at www.UnbiasedAdvice.com



Gain Complete Control Over Net Worth

Closing The Gap

Everyone has different priorities and immediate needs. The challenge is determining where best to start. Families can either jump right into our family office service or start incrementally in an area they need help with now.

We've created a series of introductory projects to help people get started:

- Net Worth Asset Allocation
- Strategic Asset Allocation
- Estate Simulation Planning
- Trust Operation Reviews
- Insurance Reviews and Audits

Once clients understand the role we play in making their lives easier, they never look back.

Engage A Family Office

- For strategic, unbiased, non-product based advice
- To simplify net worth management
- Gain a single point of contact
- For high level oversight and coordination
- For greater fee efficiency
- To reduce the risk from unaddressed matters
- For consolidated net worth reporting, and much more

How We Make This Safe

We offer both a 30 day money back guarantee on introductory projects and an option to apply project fees to the annual family office retainer when families engage us within 30 days of a project's completion.



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Unbiased Financial Services Inc. is based in Calgary, Alberta and founded in 2000. We help high net worth individuals and their families gain "complete control" over their net worth.