



# Closing the Gap

## With an UNBIASED Family Office

For High to Ultra-High Net Worth Families

### 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 an onerous and ongoing commitment of time.

Unfortunately, most families are left to manage this responsibility on their own. Given how complex the challenge, it's rare for families to possess the diverse and specialized financial skills, experience, or time to gather and consolidate the data necessary to direct a team of financial experts on their own. **This creates an oversight gap.**

### Why?

Unfortunately, the financial services industry is largely made up of subject matter experts operating within narrowly focused silos. The industry is simply not organized to provide strategic oversight on a net worth or a family-centric basis.

To do so would require advisors to understand your values, your goals, and comprehensive details regarding your family's net worth. It would require a shift away from long standing specialization practices to a more holistic approach.

### The Family Office Solution

The primary purpose of an unbiased family office is to address the gap in strategic oversight.

Our role is to guide and support families in setting clear and specific goals. Then we help establish policy; address gaps; update the outdated; provide meaningful consolidated reporting; and provide non-product-based advice and direction beyond your investment portfolio.

Aggregated record keeping and reporting, strategic planning, vendor coordination and direction are completed without you needing to become a financial expert; or dedicating your life to managing your family's finances.

Call **403.231.1936** for details  
Watch our 90 second video at **UnbiasedAdvice.com**



# Managing Beyond Your Portfolio

## Closing The Gap Starts Here

Everyone has different priorities and immediate needs. The challenge is determining where best to start. People can either start by engaging our family office services or by addressing a high-priority matter as a way to gauge fit. Once people understand the vital role we play, they wonder how they ever got along without a family office.

## Key Benefits

- Aggregated record keeping and net worth reporting
- Unbiased strategic planning, oversight, and direction
- Family-centric advice, not limited to financial products
- A single point of contact for financial advice
- Greater fee efficiency by streamlining services
- Proactivity, resulting in reduced risk from unaddressed matters
- 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 within 30 days of project completion.



## FOR MORE ON HOW TO CLOSE THE GAP

to help you manage beyond your portfolio, visit our website, download our eBook or call us to speak with an advisor.



#5, 1204 3rd Street SE  
Calgary, Alberta T2G 2S9

**403.231.1936**  
**UnbiasedAdvice.com**

Unbiased is a family office and wealth advisory service based in Calgary, Alberta. We've served as trusted advisors to high and ultra-high net worth families since 2000.

Our purpose is to help you make sound net worth planning decisions, now and for the future.