

Handwerk MFO Consultative Process

Percentage of services provided by HMFO to current clients

SERVICES	PERCENT PROVIDED
Portfolio Management	100.0%
Estate planning	75 - 95%
Charitable planning	75 - 95%
Tax mitigation	75 - 95%
Asset protection planning	75 - 95%
Alternative investments	35 - 75%
Retirement plans	35 - 75%
Succession planning	35 - 75%
Life insurance	35 - 75%
Trustee & trust services	35 - 75%
Accounting	20 - 50%
Philanthropic advisory	20 - 50%
Bill paying	20 - 50%
Currency management	20 - 50%
Tax preparation	20 - 50%
Educational programs	20 - 50%
Business management	20 - 50%
Concierge health care	20 - 50%
Family/personal security	20 - 50%
Household management services	20 - 50%
Financial oversight of business interests	20 - 50%
Deal facilitation	20 - 50%
Property & casualty insurance	20 - 50%
Business consulting services	20 - 50%
Valuations	20 - 50%