

A Trusted Advisor

“The most needed role”

We are all barraged today with offers to help us with problems we didn't know we even had. There was a time we planned our own vacations, picked our own restaurants, cleaned our own pool, and decided with our family what should go in the will. Things are different today.

There are advisors and help for everything. But, something—or someone—is missing. Someone to help us, not sell to us. Someone with our interests at heart, not a sales goal. And in the world of finance, this is especially true.

Life is more complex and busy than ever before, especially for families of significant wealth. The sheer volume of choices, models, and approaches for managing wealth has never been more complex. Add in the volatility of capital markets and the uncertainty of geopolitics, taxes, estate law, and political initiatives, and stewarding wealth becomes downright daunting.

To help them, many wealthy families have an attorney, accountant, financial planner, insurance agent, trust officer, private banker, portfolio manager, wealth strategist, and broker advising them on wealth management matters. While each of these professionals undoubtedly provide expertise and value in their key area, the most needed role of all is often missing: that of a single trusted advisor. Someone with the experience and objectivity to advise clients on their best interests in dealing with all the decisions and complexities of today's

Consilium Values

- Serve only the client's interests as a true, accountable fiduciary
- Adhere to the highest standards of ethics and confidentiality
- Practice life-long learning to ensure timely, informed thought leadership and trenchant views
- Provide proactive education and advice — custom tailored to each family member
- Partner with families for life as a promise of commitment and service
- Help a select few families to ensure exceptional service and results

uncertain marketplace, free of conflict.

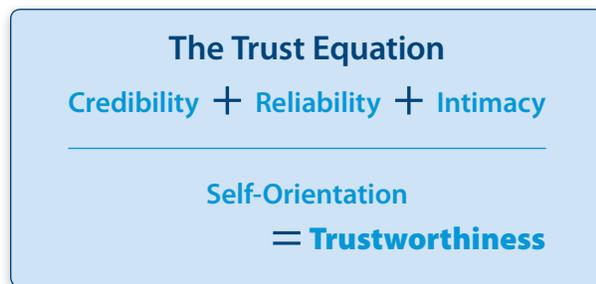
Most of the current advisors for families either lack experience outside their discipline or work for wealth management firms who they must answer to first and foremost. This dynamic inherently prohibits them from providing conflict-free advice. **A trusted**

A trusted advisor works only for you, sits on your side of the table, and coordinates, manages, and leads your overall wealth picture solely for your interests. This is the missing role.

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But how do you determine that trust? What does it look like? How can you know an advisor is trustworthy?

Charles Green, of Trusted Advisor Associates, LLC has written numerous books on the subject of Trusted Advisors. He comments that there are four elements of trustworthiness: Credibility, Reliability, Intimacy and Self-Orientation. These combine into what he calls the **Trust Equation**.



Source: "Understanding the Trust Equation." Charles H. Green. The Trusted Advisor Associates, LLC

1. Credibility has to do with the words we use. In a sentence we might say, "I can trust what he says about intellectual property; he's very credible on the subject."

Consilium serves only our clients' interests, receiving no compensation in any way besides our retained, flat fee. Further, we have more than 20 years of wealth management experience in institutional money management, as Chief Investment Officer for a major global wealth provider, and as manager of all the personnel at a wealth management firm. We know how it works, and more importantly, how it SHOULD work.

2. Reliability has to do with actions. We might say, "If he says he'll deliver the product tomorrow, I trust him, because he's dependable."

Consilium's only clients are the few, select families we serve. We help only a handful of discerning clients who desire experienced, boutique, concierge service. Our service promise allows us to be completely reliable and available.

3. Intimacy refers to the safety or security that we feel when entrusting someone with something. We might say, "I can trust her with that information; she's never violated my confidentiality before, and she would never embarrass me."

Consilium devotes itself to an intimate, professional relationship with its few clients, for life. Our passion is wealth advisory services for our clients and we aim to deliver consistency and quality of service to multiple generations of our clients. We are devoted to the long-term value that a close, intimate advisory relationship can afford.

4. Self-orientation refers to the person's focus. In particular, whether the person's focus is primarily on him or herself, or on the other person. We might say, "I can't trust him on this deal — I don't think he cares enough about me, he's focused on what he gets out of it."

Consilium's client-retained fee model fosters a unique relationship not found in financial services today. Garnering no fees from outside managers, commissions, the selling of any financial product or service, or any other relationship outside of the exclusive one with our clients, provides for complete objectivity and ability to be conflict-free. Our only purpose is to help clients achieve their goals; our client's needs are our only focus.

Consilium Wealth Advisory was created to deliver on the promise of the many benefits of an experienced, objective, trusted advisor – one that you can trust to serve your family with integrity and conflict-free focus over a lifetime. Our passion is the delivery of exceptional advice and tailored service for you and your family.

We fill the most needed role of all.