

# Legacy Knight *Engagement* Models

## How We Can Work *With You*

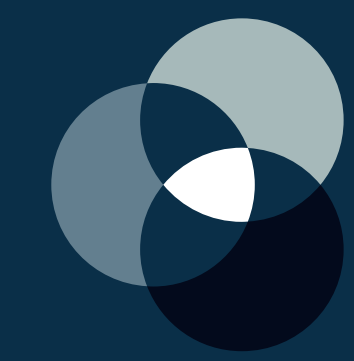
Three distinct approaches to growing and securing your legacy.

At Legacy Knight, we work with families, foundations, and family offices in three ways: through family office services, outsourced CIO services, and thematic investing. While these approaches differ in some important ways, what remains consistent across all three is the deep, interdisciplinary expertise of the Legacy Knight team and our commitment to developing a strategy that aligns with your specific objectives.

We're here to work with you in whatever way best aligns with your needs and goals.

Reach out to Legacy Knight today to start the conversation.

INFO@LEGACYKNIGHT.COM // (945) 536-5580



### Family Office

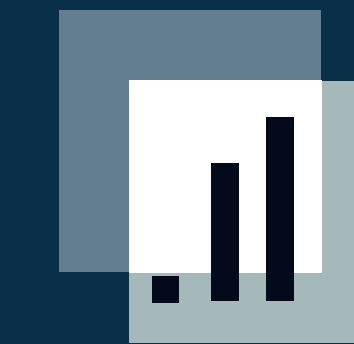
A complete financial and lifestyle partner to high-net-worth families.

**IDEAL FOR:**

First-generation or multigenerational high-net-worth families seeking a highly responsive, comprehensive partner to maintain their lifestyle and secure their legacy through services that range from financial planning and investment management to bespoke capabilities tailored to their unique needs.

**MAY INCLUDE:**

- Personal CFO
- Integrated Financial Planning
- Operating Business Services
- Goals-Based Investment Strategy
- Exclusive Investment Access
- Favorable Investment Terms
- Portfolio Management
- Consolidated Reporting
- Back Office Support
- Lifestyle Management Services



### Outsourced CIO

Comprehensive investment strategy and portfolio management services.

**IDEAL FOR:**

Families with an existing internal team, single-family office, or foundation that seek to professionalize their investment capabilities and create vital, cost-effective staff redundancies, without the complete suite of concierge capabilities central to our full-service family office engagements.

**MAY INCLUDE:**

- Goals-Based Investment Strategy
- Exclusive Investment Access
- Favorable Investment Terms
- Portfolio Management
- Consolidated Reporting



### Thematic Investing

Access to unique, sought-after opportunities with favorable terms.

**IDEAL FOR:**

Individual investors interested in gaining access to the unique investment opportunities Legacy Knight makes available to its families, without the same risk management and portfolio construction expertise or concierge services of our other engagement models.

**MAY INCLUDE:**

- Exclusive Investment Access
- Favorable Investment Terms
- Investment Reporting