



Coastline Family Office

Client Name

Established In 2012,

Coastline Wealth Management is a family founded firm created by Garrett Taylor and Cindy Grauer. The firm strives to break from the larger, institutional lack of personalization frequently found in the financial management industry

The Purpose of our Firm

To guide our clients by creating customized financial solutions regarding all aspects of their personal wealth. We currently manage over \$2.2 Billion in client assets and have over 20 experienced advisors on staff.

Coastline Family Office

At Coastline we understand that the financial needs of ultra high net worth individuals extend far beyond traditional wealth management. That's why we have curated a suite of exceptional family office services designed to cater to these clients.

Our team of experienced professionals, armed with a wealth of knowledge and industry expertise, is committed to providing you with unparalleled support and guidance. Discover the five most important services we offer to elevate your financial success and optimize your family's legacy:

1. Comprehensive Wealth Management

Our comprehensive wealth management service lies at the core of what we do. We believe in taking a holistic approach to managing your wealth, incorporating financial planning, investment strategies, risk management, tax planning, estate planning, and wealth transfer strategies.

Your dedicated advisory team will work closely with you to develop a personalized wealth management plan aligned with your long-term goals, helping you preserve and grow your assets while minimizing risks.



2. Consolidation and Reporting Services

We understand that managing complex financial holdings can be challenging. Our consolidation and reporting services provide you with a streamlined approach to tracking and reporting on your diverse assets. We consolidate information from multiple financial institutions and present you with a comprehensive view of your portfolio.

We will monitor private transitions and associated capital calls and attendant liquidity forecasting. With our advanced reporting tools and expertise, you can make informed decisions and gain a deeper understanding of your overall financial picture.



3. Family Governance and Succession Planning

Preserving your family's legacy and ensuring a smooth transition of wealth for future generations requires meticulous planning and guidance. Our family governance and succession planning services provide the framework and tools needed to establish effective structures and processes for managing your family's affairs.

From establishing family constitutions to facilitating family meetings and developing succession plans, we help foster harmony, continuity, and longevity across generations.





Efficiently transferring wealth to the next generation while minimizing taxes and preserving your family's values requires careful planning. Our wealth transfer strategies service helps you navigate complex legal and financial considerations, enabling you to develop a tailored plan that aligns with your goals.

We collaborate with estate planning attorneys and tax specialists to design comprehensive strategies, such as trusts, gifting programs, and family limited partnerships, to optimize your wealth transfer process.

4. Wealth Transfer Strategies

5. Multi-Generational Education and Mentorship

We believe in empowering the next generation with the knowledge and skills necessary to carry on your family's legacy. Our multi-generational education and mentorship programs offer tailored resources and guidance to prepare your heirs for their future roles as stewards of wealth. We facilitate workshops, educational sessions, and mentorship opportunities that cover topics ranging from financial literacy and investment management to responsible wealth stewardship and entrepreneurship.

At Coastline, our commitment to excellence and personalized service sets us apart. We strive to build lasting relationships with our esteemed clients, providing unwavering support and an array of exceptional services tailored to your unique needs. Contact us today to discover how we can elevate your family's financial success and secure a prosperous legacy for generations to come.

Our Multi-Family Office Services

Philanthropic Initiatives

Accounting

Life Administration

Tax Efficiency

Your Wealth

Your Family

Your Life

Your Business

Deal Advisory Support

Wealth Strategy

Family Governance

Wealth Reporting



Financial Planning Helps You Stay on Target to achieve your goals

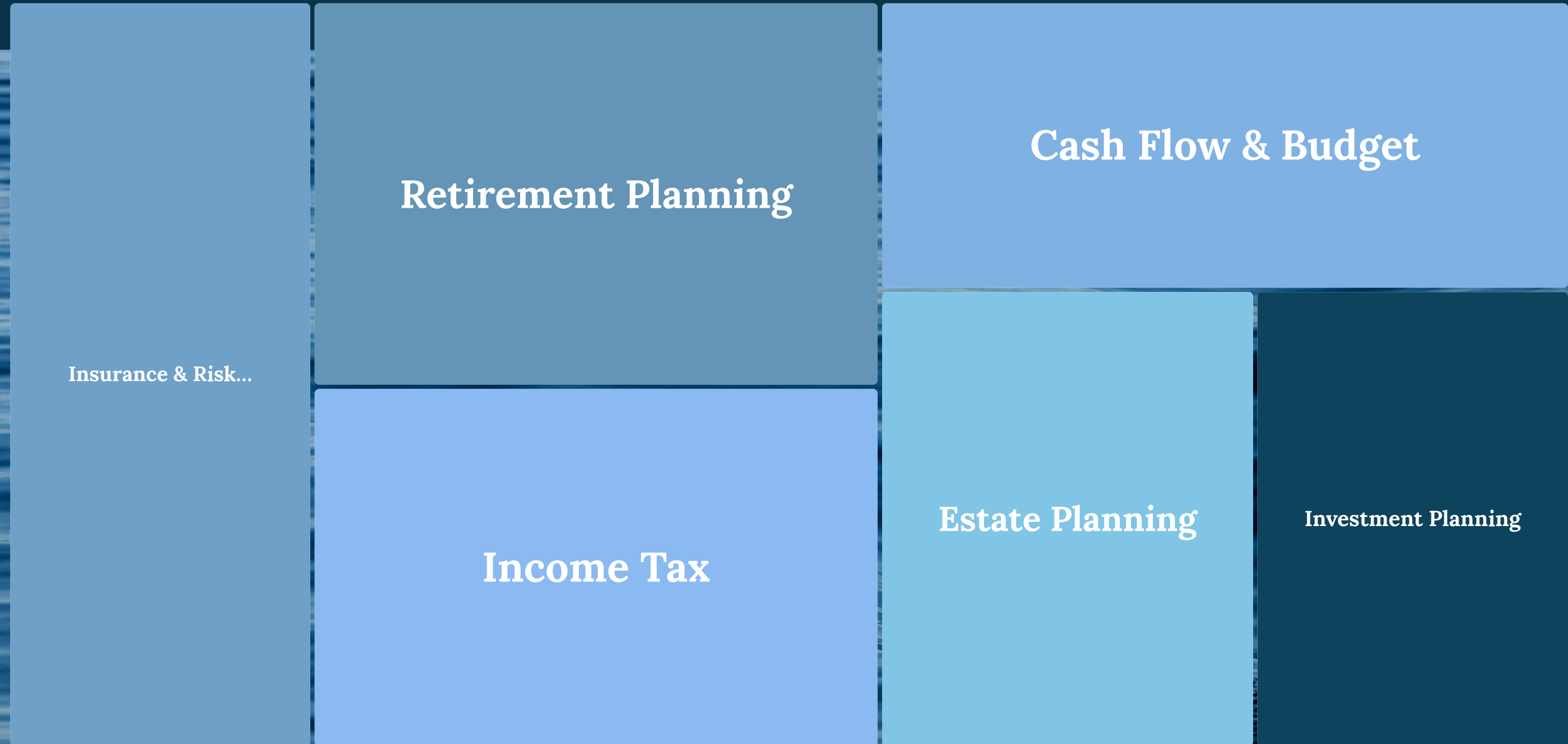


A financial planner acts as a “behavioral coach” & financial mentor

A financial plan can help you:

- Build confidence
- Organize your financial life to see the “Big Picture”
- Build personalized strategies & solutions

Components of the “Big Picture”



Behind The Scenes

Meeting 1

Meetings 2-5

Moving Forward

Financial Planning Process



Advanced Complexity

- Includes advanced Issues such as complicated estate planning, business transition planning, divorce planning, executive compensation analysis, etc.
- Quarterly Meetings
- Planning and Advice

Additional Services

Necessary Document Checklist

Current investment account statements

Showing value and positions for all stocks, bonds, mutual funds, annuities, money market accounts, stock options and certificates

Social Security statement with an estimate of earnings at retirement

Go to: www.ssa.gov to create your Social Security account if you have not done so already

Current bank account statements

Showing value and positions in checking, savings, and CDs

List of all income sources

Please include: salary, bonuses, pensions, retirement accounts, annuities, trusts, rental income, investment income

List of other assets

Please include: homes, real estate, businesses, & collectibles

Insurance Policies

Please include: life, health, disability, long-term care, home, auto, and business insurance policies

List of liabilities

Please include: personal debt, mortgages, loans, & liens

Business Information

Please include: assets, liabilities, buy-sell agreements, existing succession plans

Current contributions and/or savings

401(k) contributions, IRA contributions, savings account additions

Estate Planning Documents

Please include: wills, trusts, powers of attorney, trading authority

Coastline Capital Management

An integral part of Family Office offering is utilizing Coastline Capital Management's dedicated asset management platform. CCM is composed of a team of experienced investment professionals from top Wall Street firms armed with cutting edge technology and solely dedicated to Coastline clients and advisors at no additional charge.

Coastline Capital Management works with you to analyze your current financial situation. We then design a broad selection of bespoke solutions to help the unique needs of your family's wealth.

On an ongoing basis, Coastline Capital Management provides the day-to-day responsibilities of managing your investments which will allow you to spend more time deepening ties with your family, businesses associates, and wealth creation.



Thank you