



Eideard Group
GUARDIANS OF PROSPERITY

For decades, individuals and families of distinctive wealth have trusted the Eideard Group to provide its full-spectrum of family office and wealth management services to preserve and grow their financial assets.

MULTI-FAMILY OFFICE: THE VALUE OF RELATIONSHIPS?

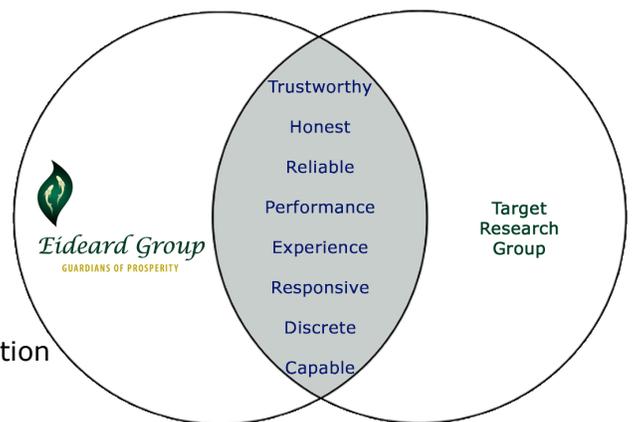
When evaluating the possibility of working with a multi-family office (MFO), people sometimes ask about the value proposition — what they will get for their money.

Certainly, the value of any advisory affiliation will vary significantly from one family to the next depending upon situation, financial position, and goals. In addition, and as stated by Albert Einstein and others, “Not everything that counts can be counted; and not everything that can be counted counts.”

However, we have determined that the common thread among the **Eideard Group’s many long-term associations is, simply stated, a trusting relationship.** While this might initially seem to be a subjective criterion, there are many quantifiable aspects of a *trusting relationship* that can transform a client family’s experience from satisfactory to exceptional, from “good to great.”

MEASUREMENTS THAT MATTER

We believe the defining characteristics of such a relationship begin with a solid foundation that is based upon *aligned priorities and values.* Defining the former is most often easier than determining the latter, and MFO leadership’s due diligence during the assessment phase of an evaluation is the first quantifiable element of the relationship.



The next quantifiable element is transparency with respect to setting clear, honest expectations from the outset, and maintaining straightforward communication protocols throughout the relationship.

Then comes the element of trust, which must be earned over time. MFO leaders must earn and sustain this trust by maintaining a long-term focus and helping each client to do the same. The MFO must also internalize client priorities, and must offer the diverse resources necessary to support those priorities as well as the emerging needs that will inevitably arise.

Investment performance, net of fees, must also exceed benchmarks over time, and MFO leadership must be consistently accessible and responsive.

These elements are the key drivers of trusting relationships, which enable both clients and MFO leaders to interact with confidence and peace of mind — things that truly count.