An Overview of Our Services

Broader scope. Deeper insights.

CTC Consulting | Harris myCFO

Integrated wealth management with independent investment consulting and the comprehensive capabilities of a multi-family office.

Integrated Wealth Management

While significant wealth brings with it the opportunity to enjoy a lifestyle that is independent, self-directed and secure, it can also bring great complexity and risk. From the moment wealth is acquired, many challenges emerge. Important decisions need to be made that can quickly become complex and often confusing, with a myriad of interconnected consequences.

Gaining expertise in any one of the many financial aspects of wealth in order to make informed decisions often requires the assistance of several financial and legal advisory professionals from multiple firms with varying degrees of proficiency, accountability and advocacy. Managing great wealth can quickly become a daunting and time consuming effort with tax implications, estate plans, investment strategy and other decisions to consider.

Many families choose to take on these challenges one by one with numerous advisors. Some establish private offices — wholly owned entities set up to oversee and manage their wealth. Some choose to hire multi-family offices — organizations that manage a mix of services for multiple families. Others choose CTC Consulting | Harris myCFO, a unique integrated wealth management firm for affluent families, family offices and individuals.

Our ability to provide clients with the broadest range of wealth management services managed in an integrated manner allows clients to choose tailored solutions that help them achieve their unique wealth and lifestyle goals.

We provide complete oversight and reporting that ensures you will have a comprehensive snapshot of your wealth without the complexity, cost, or concerns that may arise from having to work with multiple firms and reporting tools.

Investment Consulting

CTC Consulting is a premier investment consultant providing objective advice to ultra high net-worth families, family offices, trusts, endowments and foundations. CTC Consulting has a thirty-year history of working with clients to address their unique investment and tax-related issues by combining dynamic research and holistic advice aligned with our clients' interests.

Our investment services include:

- **Investment Consulting & Strategy:** The foundation for investment optimization.
- **Research:** The widest range of manager assessment and selection tailored to each clients' goals.
- **Performance Reporting:** Accurate, timely and insightful metrics to interpret your total wealth.
- **Implementation:** Expert execution and monitoring of your investment strategy.

Our singular goal is the advocacy of our clients' interests in all wealth matters, and because our only compensation comes from clients, there are never any competing interests. Unlike many firms that require you to buy a mix of their own investment products, we do not, allowing us to remain independent and objective in our investment advice.

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A Full Suite of Family Office Capabilities

Harris myCFO provides the fullest range of family office services available to clients in the industry — all under one roof and managed in an integrated fashion by a lead advisor backed up by a team of service professionals with deep knowledge and insight.

- **Tax Planning:** Planning and preparation capabilities that fit your wealth needs.
- **Financial Reporting and Expense Management:** Day-to-day management of all your financial obligations.
- **Estate and Trust Advisory:** Expert planning for the orderly and efficient transfer of wealth.
- **Risk Management and Insurance Advisory:** Ensuring proper wealth protection from liability and risk.
- **Philanthropic Planning:** The extension of your vision, values, and passions through programs and gifting.
- **Family Education:** Informing, protecting and empowering your entire family.
- **Capital Advisory Services:** The ability to leverage and maximize your assets to the fullest.

Getting Started With CTC Consulting | Harris myCFO

Time is often a critical factor in preparing for, and managing wealth opportunities. If you face a near term liquidity event that may lead to significant wealth, you should consult a CTC Consulting | Harris myCFO professional prior to the event or as soon as possible.

These may include a business transaction such as an IPO, stock transaction, sale of a business, or a personal event such as retirement, inheritance, divorce or other legal settlement.

We can ensure you benefit by using an integrated approach, from the initial safe keeping of your liquid assets, to the personalized strategy and plan we develop with you to meet your goals and lifestyle objectives.

Contact one of our professionals in any of the offices listed below and we will be happy to provide you with more detailed recommendations on how to best protect, manage and grow your personal wealth.

Uniquely Qualified to Serve Clients:

- *CTC Consulting | Harris myCFO* typically serves clients with investable assets of $25 million or more or net worth of $100 million or more.
- *CTC Consulting | Harris myCFO* has over 400 client and family relationships.
- *CTC Consulting | Harris myCFO* has over 200 multi-disciplinary professionals in offices across the United States.
- *CTC Consulting | Harris myCFO* is part of BMO Financial Group, the twelfth largest financial group in North America, founded in 1817 with over $413 billion in total assets and 45,000 employees.

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