



(/welcome-fi3-family-office)

Your tomorrow is our focus today.



# A Family Approach to Wealth Management

By the Family CFOs of Fi3

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## Welcome to Fi3.

We are an independent, “fee-only” Registered Investment Advisor (RIA) and multi-family office. We serve as a fiduciary, providing financial planning and investment management services to high net worth families, acting as the Family CFO.

“Fee-only” means our only method of compensation is the fee we receive for the consulting advice we give. We don’t sell products; we don’t receive commissions. We do believe in fee transparency and value creation.

Your experience with Fi3 will be highly personalized. We’ll ask thoughtful questions, listen to your perspective, and deliver the tools you need to make effective financial decisions for your family.

## Who We Help.

*Innovators*

*Independents*

*Integrators*





We serve entrepreneurs, executives, and professionals who are focused on being innovators in their respective fields.

We serve individuals and families who want actionable advice to meet their goals and maximize their resources.

We serve individuals and families whose wealth extends to multiple generations, leading to heightened focus on family and community legacy.

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## We Are Your Family CFO.



### ***How we serve you.***

We act as the Chief Financial Officer, supporting the family. We are a multi-family office, with CPAs and CERTIFIED FINANCIAL PLANNER™ practitioners who understand the language of business.

We recognize family dynamics. We collaborate with your other professional advisors to implement the plan.

### ***We are fiduciaries.***

We are “fee-only” advisors. We only receive fees for the consulting advice we give. We don’t sell a particular product. We don’t have any revenue sharing

arrangements. We don't receive kickbacks. We don't have any hidden revenue sources. Period.

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[THE FI3 FAMILY OFFICE \(/WELCOME-FI3-FAMILY-OFFICE\)](/welcome-fi3-family-office)

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