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 **TFOPHOENIX**
THE FAMILY OFFICE
(<https://tfophoenix.com/>)



What's My **WEALTH FOR?**

It's a simple question, but one that rarely gets asked, answered or implemented.

[Learn more: What's Your Wealth For?](#)

<https://tfophoenix.com/whats-your-wealth-for/>

Family Is What We Do

We are a family wealth office. We help affluent families like yours connect wealth with purpose so your family's wealth will endure life's inevitable transitions.

When you work with us, we believe issues can feel less complex – less of a burden. If families gain peace of mind by working with us and are able to live with purpose, that will be our greatest accomplishment.

Helping families be families, **it's what we do.**

Families We Serve

Our wealth and purpose approach suits families that have a long-term vision and are looking for holistic, independent advice to help them create a path to use their wealth in a way that is meaningful to them.

Families interested in:

- Creating a plan that aligns their substantial wealth with their intended purpose.
- Collaborating to understand and sustain their values.

- Maintaining a long-term relationship intended to help them navigate through their journey.

Families who understand that:

- Engaging professionals to assist them can create time for the activities they most enjoy.
- Their skills may not include those needed to develop and execute a successful plan by themselves.
- The wealth they have created and values they uphold may not be sustainable without a thoughtful, disciplined approach.

Wealth & Purpose Knowledge Base



Seven Insights

on Sustaining Your Wealth (<https://tfophoenix.com/seven-insights/>)

(<https://tfophoenix.com/seven-insights/>)

(<https://tfophoenix.com/seven-insights/>)

(<https://tfophoenix.com/seven-insights/>) (<https://tfophoenix.com/the-four-types-of-wealth/>)

(<https://tfophoenix.com/seven-insights/>)



FOUR

Types of Wealth (<https://tfophoenix.com/the-four-types-of-wealth/>)

(<https://tfophoenix.com/the-four-types-of-wealth/>)

(<https://tfophoenix.com/the-four-types-of-wealth/>) (<https://tfophoenix.com/whats-your-wealth-for/>)

(<https://tfophoenix.com/the-four-types-of-wealth/>)



Wealth

...What's It For? (<https://tfophoenix.com/whats-your-wealth-for/>)

(<https://tfophoenix.com/whats-your-wealth-for/>)

(<https://tfophoenix.com/whats-your-wealth-for/>)



**Check out the
recent happenings
at TFO Phoenix!**

Exciting TFO News!

(<https://tfophoenix.com/exciting-tfo-news/>)



Charitable Contribution Documentation Reference Guides

Charitable Contribution Documentation Reference Guides
(<https://tfophoenix.com/wp-content/uploads/2019/03/18.0063-Substantiation-Guide.pdf>)



What's Your Story?
(<https://tfophoenix.com/wp-content/uploads/2019/02/18.0033-Origins-Whats-Your-Story.pdf>)



TFO Insights

from TDC Marketing, Video

1 of 4 Part 1: Market Pricing

04:45



This series was originally conceived by Independence Advisors LLC of Wayne, Pennsylvania, USA.

How to Build and Execute an Effective Wealth Plan

PURPOSE

Asking the “tough”
right questions

CIRCUMSTANCES

Developing a detailed
understanding

COLLABORATION

Working with a
diverse and
experienced team

RECOMMENDATIONS

Building the right
plan for your
family's specific goals

RE-EVALUATION

Providing a proactive
and adaptive
approach as wealth
and values evolve



CONNECTING WEALTH AND PURPOSE[®]

AWARDS & MEDIA

- TFO Phoenix Named to 2019 Financial Times 300 Top Registered Investment Advisers (<https://tfophoenix.com/tfo-phoenix-named-2019-financial-times-300-top-registered-investment-advisers/>)
- 2018 “Best Places To Work” – Fifth Consecutive Year (<https://tfophoenix.com/2018-best-places-to-work-fifth-consecutive-year/>)
- Two TFO Phoenix Advisors Named Top Young CPAs in Financial Planning (<https://tfophoenix.com/2-tfo-phoenix-advisors-named-top-young-cpas-in-financial-planning/>)

- TFO Phoenix Named to the 2018 “300 Top Registered Investment Advisors” by The Financial Times (<https://tfophoenix.com/tfo-phoenix-named-to-the-2018-300-top-registered-investment-advisors-by-the-financial-times/>)
- SCOTT HORN NAMED THE TOP ARIZONA ADVISOR BY BARRON’S MAGAZINE (<https://tfophoenix.com/scott-horn-named-top-arizona-advisor-barrons-magazine/>)
- 2017 “Best Places To Work” – Fourth Consecutive Year (<https://tfophoenix.com/tfo-phoenix-named-2017-best-places-work-phoenix-business-journal-fourth-consecutive-year/>)
- Scott Horn Featured as one of the Phoenix Business Journal’s Wealth Management Table of Experts (<https://tfophoenix.com/scott-horn-featured-as-one-of-the-phoenix-business-journals-wealth-management-table-of-experts/>)
- Scott Horn Named a Top 5 Arizona Advisor by Barron’s Magazine for Third Consecutive Year (<https://tfophoenix.com/scott-horn-named-a-top-5-arizona-advisor-by-barrons-magazine-for-third-consecutive-year/>)

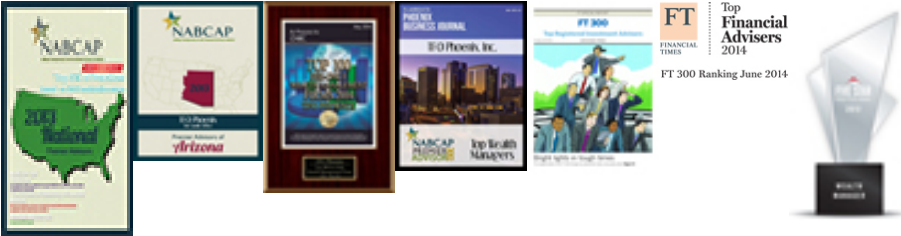
CONTACT INFORMATION



5060 North 40th Street,
 Ste. 200
 Phoenix, AZ 85018
 (602) 466-2611

(<https://www.linkedin.com/company/tfo-phoenix-inc>)

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