PERSONAL CFO PLATFORM

The Lenox Personal CFO Platform is our financial planning platform that allows us to seamlessly integrate your entire financial life into an extensive plan giving you confidence that all your assets are working towards your goal. It incorporates a range of financial planning components and analysis resulting in a clear plan to help achieve your long-term financial goals.

The Lenox Personal CFO is available at two levels, Essential and Comprehensive.
Essential is outlined below and Comprehensive is detailed on the other side of this overview.

Essential CFO

Analysis

- Discovery session to gather information and formulate your financial foundation, values and motivations.
- A Certified Financial Planner will review your personal situation.
- Prepare your customized financial plan, with specific personalized recommendations, to help establish and reach your financial goals.

Technology

- LWA Team will create a customized website for you to maintain a consolidated view of your personal financial information.
- Aggregate financial data to automatically pull in account information from over 10,000 institutions.
- Access to a personal vault for you to store electronic copies of important personal documents (Legal Documents, Deeds, Tax Returns, etc).

Financial Roadmap

- We'll provide a prioritized list of actions to mitigate risks, take advantage of opportunities, and improve your overall strategy.

Ongoing Support

- Quarterly "Check Point" calls with your Planning Team to ensure all aspects of your strategy are on track.
- Annual meetings for a full review of all documents, update information, and a comprehensive review of your entire financial profile.
- How are you keeping track of different accounts and advisor relationships?
- Are you working with your advisors to implement tax planning strategies at year end?
- If something were to happen to you, would your spouse and family understand all aspects of your financial life?

Comprehensive CFO

Includes all the benefits of the Essential CFO on the other side of this overview, plus the following enhancements:

Assisted Onboarding (First Year)

LWA Team will proactively work with you and your existing advisors to gather all necessary documents and information.

Implementation

LWA Team will take the lead on implementing recommendations.

Proactive Planning

Constantly monitor and reach out as new opportunities or risks arise.

Advanced Strategy

Scope of recommendations will include advanced wealth transfer strategies, situational planning, and monitoring progress toward goals.

Unlimited Access

- Access to a dedicated team at all times.
- Your Planning Team is available to meet as requested. Typically four in person meetings per year and as needed for specific issues.

Coordination of Advisors

LWA Team will work directly with other advisors, accountants, attorneys, bankers, etc.

Site Maintenance

Customized website will be proactively maintained by your team.

Online Vault Maintenance

We'll manage your electronic vault contents including uploading or scanning documents on your behalf.

Expense Analysis and Tracking

Access to a expense tracking tool as well as assistance from LWA Team to organize and measure annual expenditure.

Unlimited Cash Flow Scenario Planning

LWA Team is available to run multiple iterations in the cash flow and retirement model.