ARROWROOT Family Office

AFO WEALTH MANAGEMENT FORWARD

AFO Wealth Management Forward

Welcome,
AFO Wealth Management Forward

Arrowroot Family Office is a Holistic Wealth Management Firm and is part of the larger Arrowroot platform including the Private Equity Division (Arrowroot Capital) and the Mergers and Acquisition Advisory (Arrowroot Advisors).

In line with the tradition of creating a family office as a turnkey solution to outsource the complex investment and financial needs of wealthy families globally. Arrowroot Family Office is designed to provide a family office approach to holistic wealth management regardless of the client's net worth.

AFO Wealth Management Forward is an innovative program that teaches accounting firms how to adopt Holistic Wealth Management Services by implementing financial planning, estate planning, life insurance, as well as, asset and liability management into their firm. We leverage our world-class professionals' skills, a cutting-edge suite of software providers, and our best practices to provide our program participants with the knowledge and tools to grow their firm.

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Add Wealth Management Services

Wealth Management

- Investment Advisory
- Financial Planning
- Estate Planning
- Life Insurance

Business Management

- Business Advising / Planning
- CFO & COO Consulting
- Business Best Practices
- Investor Services
- Treasury Management
- HR & Compliance Support

Tax Services

- Tax Preparation
- Bookkeeping
- Payroll Administration

Our Investment Philosophy

Arrowroot's Investment Philosophy is broken down into 4 basic concepts below:

Provide Holistic Financial Advice

Holistic financial planning to improve the financial situation through a comprehensive assessment of several financial variables.

Asset / Liabilities / Insurance / Tax & Estate Planning

Practice Disciplined Investor

Focus on Best-in-class Investments and After-tax Results

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AFO Wealth Management Forward

Our Arrowroot Family Office (AFO) AFO Wealth Management Forward (WMF) Program was created to assist firms with an advisory model that is sound, time- saving, and highly effective at attracting results. The program allows firms to adapt to the ever- changing marketplace by enabling them to thrive through the addition of wealth management services.

01. It offers new revenue and diversified service options

02. Retaining old clients and offering them new services is more cost-effective

03. Clients receive more comprehensive services

04. Clients gain valuable financial insight

Services Offered

- Financial Planning
- Investment Advisory
- Estate Planning
- Life Insurance

Holistic financial planning is a top down approach to planning that focuses on your big picture goals and values rather than a one size fits all approach or viewing your financial life in silos.

Holistic Financial Advice

Holistic financial planning focuses on your whole financial situation through comprehensive assessment of a multitude of financial variables including:

- Cash management, investments, education savings, retirement savings/income distribution, insurance coverage and even estate planning and trust needs — and creating strategies to effectively address each in support of your and your family's long-term financial well-being and goals.
- See your finances from a holistic point of view, providing insight into how one financial decision could affect another.
- Track your personal progress and make valuable adjustments as you experience lifestyle, emotional or physical changes.

Investing Made Easy

Account Opening in Minutes

You and your clients can open accounts in minutes, without the cumbersome paperwork

Streamlined Accounting

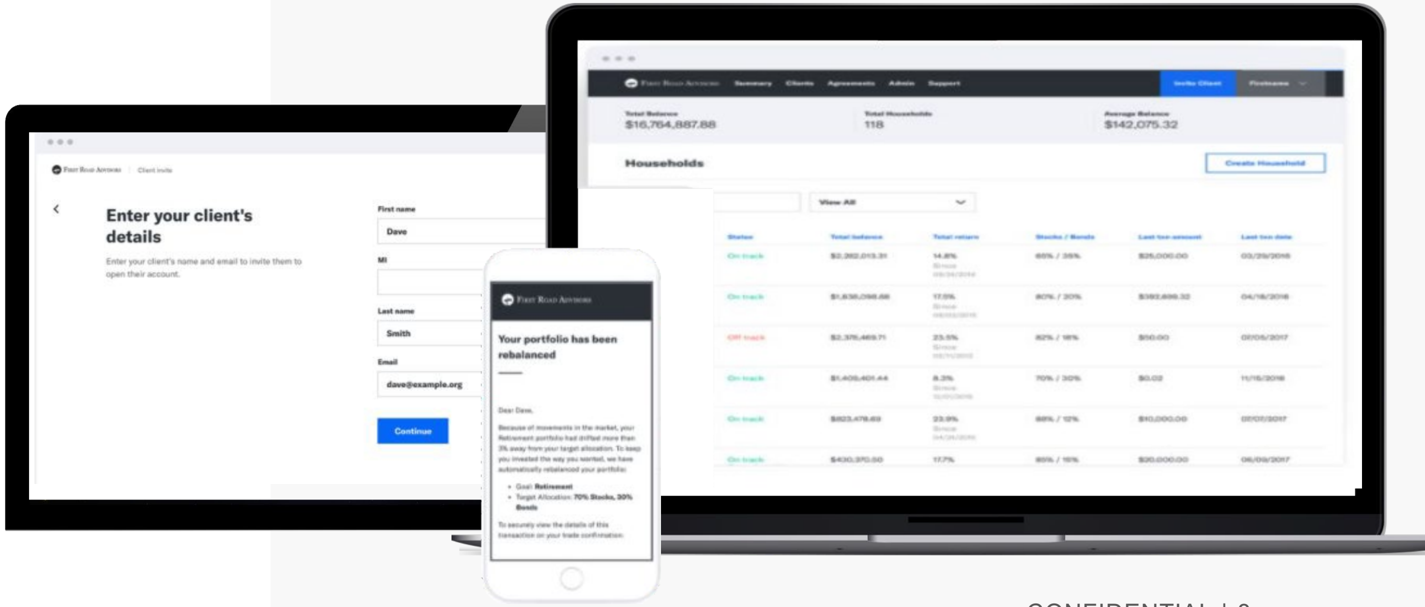
We keep a record of client transaction history and provide you and your clients with all necessary tax forms.

Automated Billing

We automatically track, calculate, debit, and distribute fees.

Deliver a transparent and intuitive interface

Our website enables clients to easily see their wealth in one place, understand what they're invested in, and track their progress.



Estate Planning Services

55% of people do not have a will and 74% consider Estate Planning a confusing topic

We want to change that

Financial and Medical Decision Makers

Consider who you would like to make financial and medical decisions for you if you are physically unable to do so for yourself

Guardians

If you have minor children or an adult dependent, consider who you would like to serve as their guardian if you are unable to serve in that role

Specific Gifts

Consider any specific gifts of cash or personal property that you might like to leave people or charity at your death

Health Care Wishes

In your health care directive, you are asked to specify when you would like the “plug pulled”

Trusted Insurance Partners

- Life Insurance
- Health Insurance
- Umbrella Policies
- Long Term Disability
- Universal
- Private Placement
- Deferred Benefit Plans
- Key Man

About The Program

AFO answers the automation problem plaguing the Accounting profession. Costs are increasing, compliance revenues are shrinking, and too many firms are pricing by transaction vs. value-based pricing. Accountants are giving their knowledge away for less than it is worth! Pricing for services needed to change, advisory services was needed, automation was changing the industry, and the industry lacked quality talent.

Wealth Management Forward was created to allow Accounting Businesses to integrate Wealth Management Services into their accounting firms with ease. Our model allows you to diversify services, increase revenue, and deepen client relationships.

Our campaigns are aimed at taking your business to the next level in simple steps that allow you to:

Discover the right wealth management program for your business model.

Determine the best level of wealth management program(s) for your company.

Implement the best Wealth Management Services into your accounting firm.

Our Wealth Management Program - Three Levels

LEVEL ONE

Outsource & Reporting

This is excellent for Accounting firms that are interested in expanding their services to clients. At this level, you will get paired with a qualified Fiduciary Advisor that will work with you and your clients to provide Wealth Management Forward services.

LEVEL TWO

Partnership Model

This is a perfect fit for Small to Mid-Size Accounting Firms that can dedicate resources/personnel to adopting Wealth Management Forward services but want to have an experienced partner to help serve clients. You will be paired with a Wealth Management Firm that will work with you and your clients at this level.

LEVEL THREE

Full In-House RIA

Level 3 is for any size Accounting Firm that can dedicate its resources and time to build a Wealth Management Firm in-house. You will receive a Wealth Management implementation team to guide you through the licensing, registration, compliance, and monitoring process.

Benefits & Gains

Our Wealth Management Forward Program offers a wide range of benefits for a wide range of clients, including the following:

Accounting Firms

- Increased revenue with diversified service offerings
- Deeper client relationships
- Increase in enterprise value of the firm
- Wealth Management and Accounting Advisory Services complement one another

Clients

- Clients receive Wealth Management services
- Collaboration between Accounting and Wealth Management
- More effective tax planning strategy
- Clients start to develop a disciplined financial mindset

What else do you stand to gain?

Value Addition to your Firm and your Clients & Best practices on how to implement your advisory services

BENEFITS OF JOINING THE ARROWROOT FAMILY OFFICE WEALTH MANAGEMENT FORWARD PROGRAM

Every level of the AFO Wealth Management Forward Program has its benefits. Whether you're looking to expand your client base and outsource the heavy lifting or build your own Wealth Management firm, we have something for you.

LEVEL 1

(Outsource and Reporting) Package includes the following services:

- Market your Advisory Firm with Wealth Management Service Collaboration
- Leverage Wealth Management to create value-based pricing arrangements on accounting advisory services
- You have access to and can collaborate with a Wealth Manager
- Increase Revenue, Transform Pricing and gain deeper client relationships

In addition to this, you will be assigned a dedicated client success manager and implementation specialist to guide you through our Level 1 Wealth Management Outsource and Reporting Program.

When you sign up, you receive

- Full access to wealth management forward training videos, checklists, and webinars
- Partner Reporting and Portal
- Incorporate the Two Meeting Approach with added Wealth Management Services
- Access to the wealth management team to answer any firm or client questions

What You Gain

- Leverage wealth management to sell Accounting Advisory Services and transform into a value- based pricing model.
- A firm can benefit from Wealth Management without licensing or back- office work.
- Market your advisory Firm through our collaborative service offerings

LEVEL 2

(Wealth Management Model Partner) Package includes the following services:

- Revenue Sharing and ability to Market Wealth Management Services
- Leverage Wealth Management to create value-based pricing arrangements on accounting advisory services
- You have access to and can collaborate with a Wealth Management Team
- Increase Revenue, Transform Pricing and gain deeper client relationships

You will receive a dedicated client success manager and implementation specialist to guide you through our Level 2 Wealth Management Hybrid/Partner Model Program

When you sign up, you receive

- Revenue Sharing from AUM Fees
- Full access to wealth management forward training videos, checklists, and webinars
- Partner Reporting and Portal
- Incorporate the 2 Meeting Approach with added Wealth Management Services
- Access to the wealth management team to answer any firm or client questions
- Path to become your own RIA

What You Gain

- Revenue Sharing
- Leverage wealth management to sell accounting advisory services and transform into a value- based pricing model
- Benefit from Full Wealth Management back- office services
- Market your Wealth Management advisory Firm

LEVEL 3

(Wealth Management Full In-House RIA) provides the following benefits:

- Market your Accounting & Wealth Management Firm
- Increase Revenue, Transform Pricing and gain deeper client relationships
- You have access to our Marketing Library
- Turnkey solution to offering wealth management services in-house

You will receive a dedicated client success manager and implementation specialist to guide you through our Level 3 Wealth Management Full In-House RIA.

When you sign up, you receive

- Increased Revenue
- Full access to wealth management forward training videos, checklists, and webinars
- Full Software Stack Training
- Compliance and Registration Assistance
- Incorporate the 2 Meeting Approach with added Wealth Management Services
- Access to Wealth Management Forward team to answer any firm or client questions

What You Gain

- Leverage wealth management to sell Accounting Advisory Services and transform into a value-based pricing model
- Can fast track to becoming a Wealth Management Firm
- Market your Wealth Management Firm

When you JOIN our Wealth Management Forward Community, you get the chance to:

- Collaborate with fellow AFO Wealth Management Forward Member Firms
- Share Best Practices and success stories
- Access Special Wealth Management Forward Content

You also get access to:

- Content and Tools (Videos, Templates, Checklists, and more)
- Virtual Meetings
- Ongoing Coaching
- Webinars

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Thank You

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