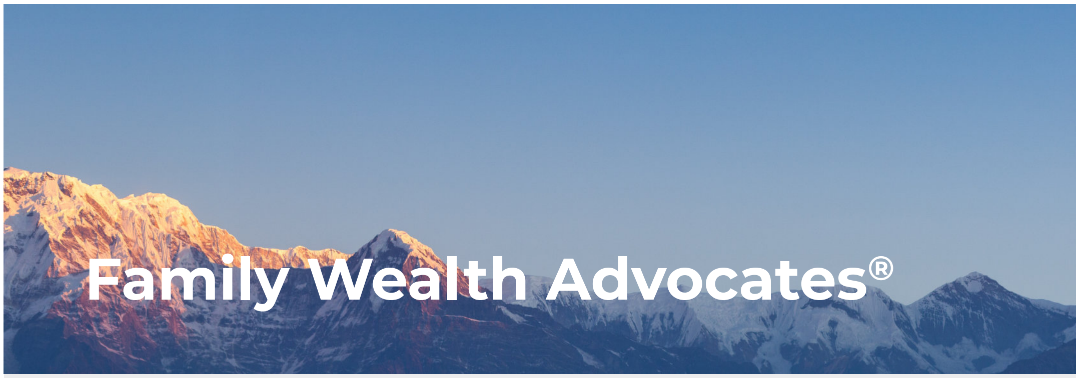


Family Wealth Advocates®

Highland
CONSULTING ASSOCIATES, INC.
Family Wealth Advocates®

Client First.
Every Opportunity.
Every Interaction.

Your Wealth Exceeds Your Accumulated Assets

Wealth is an accounting for all that's valuable in your life. It includes your financial assets, but it goes far beyond. Your relationships, values, experiences, interests, and philanthropy are also facets of your wealth. Managing wealth in a holistic way requires an understanding of what matters most to you. Once that's defined, we can design strategies to help you steward your wealth into the future and enjoy it more today.

At the Heart of the Matter are Your Reasons Why

Your responses to the question "why" lead to meaningful conversations about your family's wealth and how to enhance, preserve, and transfer it wisely.

Why are you concerned about your family wealth planning or business succession?

Why is now the time to get clarity for your financial future?

We follow the question "why" with questions of what and who to determine what is your vision for the future, and *who or what is a part of it?*

What will bring you greater contentment and peace of mind?

Who will steward your legacy—including your financial, relational and social assets?

What's necessary to prepare your successors and heirs?

Having discovered your reasons why, we apply our know-how and our strategies and tools to help you realize your financial and relational goals.

It's Your Story. We're Listening.

Our interactions with you to understand your deeply held values (and your concerns and expectations, too) set Highland apart.

Since 1993, we have advised clients in the processes and plans that create wealth that lasts. Along the way, we frequently serve our clients by facilitating family meetings and coaching families through the process of wealth management. This depends on you and your story, and how you want to tell it.

- A Boutique Consultancy – Your Family Wealth Advocates®
- Holistic Counsel on Investment Management, Estate Planning, and Business Succession
- Financial Management Strategies to Enhance Wealth; Advice to Strengthen Relationships
- Defining and Measuring what Matters to You to Build Wealth that Lasts
- Highland Consulting Associates, Inc. Since 1993

What You Leave Behind...

can become larger than what you built in life

By posing often unasked questions we can discover the bedrock of what wealth means to you. With that as our guide, we engage Highland's resources: world-class investment options, efficient tax and legal strategies, and time-tested processes to help you live on purpose and give generously today, while perpetuating your deeply held values tomorrow.

Business Owners

Let us help you foster the conditions for multigenerational business success. As your Family Wealth Advocates®, we can counsel you in succession planning that preserves wealth and family unity.

Business Executives

Business leaders benefit from ongoing and independent counsel on tax-efficient strategies, equity-based compensation options, and investment portfolios. What you have and what you are accumulating has to be considered against this: *Where do you want to go? What story do you want to tell?*

Families

You may have accumulated or inherited significant financial resources and you may also have substantial relational and social wealth. Highland's holistic planning process begins with a proprietary questionnaire called *Life on Purpose*. Your responses will allow us to develop a master plan to:

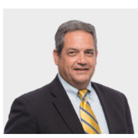
- **Enhance** wealth through investment strategies.
- **Preserve** wealth through comprehensive tax and legal strategies.
- **Advance** wealth through meaningful philanthropy.
- **Enjoy** wealth by sharing what matters most (beyond financial wealth).

Women

Women are significant managers and influencers of family wealth and philanthropy. We've learned that women seek greater alignment of their investments with their values, and they want to understand *and* be understood. Our advocacy promise assures *all* of our clients objectivity, transparency, and informed advice.

Unlocking Wealth to Enhance Lives

Wealth without utility is only a number. Let's have a conversation about using and growing your wealth to accomplish more of what brings you joy. Let yours be a life invested in purpose — maximizing your resources, and building wealth that lasts.



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Advocate

ad·vo·cate Noun /ˈadvəkət/

One who pleads the cause of another.

Highland was founded by a small group of associates convinced that clients could be better served with integrity, impartiality, and stewardship.

We describe that founding principle as "investor advocacy."

As your Family Wealth Advocates®, we advocate for you with unbiased counsel and technical expertise to help you grow and protect your assets. But we go beyond financial measures to guide your consideration of how wealth can deepen relationships for greater enjoyment today, and impact what matters most to you for generations to come.

At Highland, our allegiance is to you and your story of a life invested in purpose.