## Our Family of Firms - Where We Are Today





Managed services for TDC family of firms
(TDC Investment Advisory and TDC Life)

Established: 1958



Kevin Jansen Chief of Staff

Beneficial Owner

Cleves Delp, ChFC<sup>6</sup>

Beneficial Owner

Beneficial Owner

Beneficial Owner

Beneficial Owner

Life Insurance Professional

Wealth Management



### **Wealth Management & Retirement Plan Services**

Established: 2010 (formerly LPL)

Assets under management: (as of 12/31/2022) \$3.223B

Consults on an additional self-directed retirement plan assets under advisement: (as of 12/31/2022) \$526M

Director and Beneficial Owner



Brady Fineske, CFP®

Multi-Family Office



### **Family Office Services**

Established: 2011

Assets under management: (as of 12/31/2022) \$3.34B

Director and Beneficial Owner



Scott Horn, CPA President **Public Trust Company** 



### **Trustee Services for Ultra-Affluent Families**

Established: 2018

Assets under management: (as of 12/31/2022) \$2.75B



Donald Scott, JD
Director & Vice President

Marketing Company



### **Marketing and Creative Digital Services**

Established: 2021

Brand discovery, graphic design, website development, social media, video and more



Beneficial Owner

Jesse MacDonald
Director of Marketing

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Life Insurance



### **Life Insurance and Estate Planning Services**

Established: 2011

Life insurance death benefit under management: (as of 12/31/2022) Over \$11B



Tyler Horning Principal

Beneficial Owner

Christopher Erblich, Esq.

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**IP Company** 



### **Financial Literacy and Education**

Established: 2021

Dedicated to owning, developing, and licensing intellectual property pertaining to financial literacy and education



Jesse MacDonald
Director of Marketing

Life Settlements



## **Life Insurance Liquidation Services**

Established: 2019

Death benefit sold since 2019: \$531M



**Disclosure:** These companies are affiliated companies of TFO-TDC, LLC dba TDC Investment Advisory. Please reference the TFO-TDC's ADV Part 2A brochure for further disclosure.

TFO-TDC, LLC and TFO Phoenix, Inc. are registered as investment advisers with the SEC. SEC registration does not constitute an endorsement of either firm by the Commission nor does it indicate that the adviser has attained a particular level of skill or ability. TFO Phoenix Inc. and TFO-TDC, LLC are not engaged in the practice of law.

Please note: These firms are not all under common ownership or control but connected to TDC Companies, Inc., Cleves Delp, in his individual capacity, or Christopher Erblich, in his individual capacity.

# Our Family of Firms - Where We're Heading



**Holding Company (Est. 2023)** 





Maumee, OH RIA F.K.A. TDC Investment Advisory





Phoenix, AZ RIA F.K.A. TFO Phoenix





South Dakota-Based Trust Company F.K.A. PandoTree Trust Company





Maumee, OH Marketing Department F.K.A. TFO Marketing Group





Maumee, OH Life Insurance Company F.K.A. TDC Life