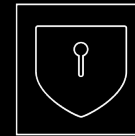
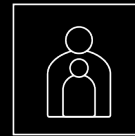


VALEN®





A new organisational philosophy to serve the entire spectrum of family need

Developed from deep and critical analysis of the current Family Office ("FO") environment and reflection on 30 plus years experience in managing family affairs

A paradigm-shift in multi-service organisation, delivering effective communication and control systems for modern FO arrangements

Using cutting-edge digital tools in the delivery of innovative solutions to the increasingly complex and sophisticated demands of the 21st century global family

Represented in the establishment of the VALEN FOR FAMILIES digital platform and VALEN FOR PARTNERS service providers' association

Placing families closer to real-time, richly-informed, decision-making through the use of a unique operational vocabulary amongst themselves and their professional partners

A new needs-based philosophy: lifestyle, growth, succession and protection

For families seeking a new experience and lifestyle choice in the management of their affairs, which is entirely adaptable and scalable to accommodate:

- ☐ Cultural or religious backgrounds
- ☐ Business families or post-sale scenarios
- ☐ Physical locations of all family members
- ☐ Any type of family governance framework



LIFESTYLE



GROWTH



SUCCESSION



PROTECTION

NEEDSPHERE

VALEN's philosophy is reflected within new functional, visual and linguistic methodology

- Satisfying the perpetually-changing requirements of each family's "Needsphere"
- "Needscoping" the rich data flowing from families and their service providers into the VALEN Platform to create a common and wide-functioning user interface



Every family lives within its own unique and perpetually-changing "Needsphere" which the VALEN Program has adopted as a primary user interface function

VALEN's core organisational tools can also, where appropriate, form the framework within which certain families may wish to define their entire governance system

LIFESTYLE

Family lifestyle perspectives

Administration facilities for all family governance activities

Health awareness

Maintenance of leisure activities

Family or individual social event planning

Concierge, secretarial and domestic management services

Management of travel and security arrangements

Reporting and administration support arrangements

Daily payment facilities



Family lifestyle partners

Concierge, domestic & security services

Personal admin services

Investment adviser (Income)

Banking services

Yacht, plane, transport management

Vacation/Travel management experts

Wellbeing services/Health Screening Experts

Security

GROWTH

Growth perspectives for families

Financial growth

Strategies for, and management of, growth of family asset base

Family growth

Planning for growth in physical numbers

Family governance & engagement strategies & customs

Growth of family collective social capital

Growth of the family `story`

Integration & formalisation of family mores, traditions and culture

Personal member growth – social understanding and interaction

Spiritual and emotional growth and wellbeing



Growth partners for families

Philanthropy service providers and experts

Investment management consulting, execution and custody (capital assets)

Schools, universities, training institutions

Family governance specialists (`Dynastic Strategists`)

Fiscal planning and mitigations experts (lawyers, accountants, tax)

Trustee/mentor involvement with beneficiaries/family members

Counselling and life coaching

SUCCESSION

Succession perspectives for families

Strategies to manage succession of family capital including passive assets and businesses

Programs to prepare family members for succession into their chosen official roles within the family ecosystem

Formalisation of arrangements to ensure succession of family tradition and reputation



Succession partners for families

Trust companies – to establish and manage succession vehicles including trusts and foundations

Estates lawyer - for planning strategies for the succession of estates held around the world and suitable family centric solutions

Family lawyers/governance experts – to undertake family governance and business roles including decision-making training

Trusteeships and family mentor offices – selected experts to undertake these crucial roles for families

Corporate lawyers/accountants – to manage succession of family business assets, across family members and/or into sale phase

Investment adviser – in the capacity of mentors for suitable family members who undertake official roles in this area

PROTECTION

Family protection perspectives

To protect....and be protected –

Insurance and assurance against risk and life-changing events

Ensure family and its assets are protected, both legally and against loss.

Security of family members and their living environment

PR and family governance strategies designed to protect family reputation and image

Protection against cyber-risk

Understanding risk of, and maintaining protection against, impact of poor lifestyle choices



Protection partners for families

Security services for families and their physical assets

Insurance brokers

Trust, tax, family lawyers

IT security experts

PR firms

Investment advisers` services in the area of loss mitigation

