UNTITLED

FIRST LEGAL FAMILY OFFICE OF THE AMERICAS

At **UNTITLED First Legal Family Office**, we offer our most sophisticated clients ongoing holistic assistance, permanent legal, tax, and fiduciary support, and coordination services.

This service is ideal for family groups with complex fiduciary structures or family circumstances, as well as for Ultra-High Net Worth individual clients (holders of assets over 30 million dollars that imply certain degrees of complexity) or institutional families (with over 100 million dollars in assets with related complexity).
Other clients of our First Legal Family Office are financial institutions specialized in these types of clients, private bankers, and multi-family offices.

We work proactively with clients, seeking to be **the single point of contact** for international legal, accounting, and fiduciary needs.

In other words, we focus on the selection, organization, and supervision of all providers of legal, accounting and/or fiduciary services for this type of client and we advise them on the best structure(s), jurisdiction(s) and providers to protect their wealth to achieve their wealth planning objectives, such as attaining the highest level of privacy, reducing taxes and contingencies with tax authorities, organizing the succession and defining the best possible domicile, among other aspects.

WHAT WE DO?

> Diagnosis of our client's current net worth structure, and definition of a route map for the future.

> Implementation of changes recommended if any.

> Selecting the jurisdiction(s).

> Selection and supervision of provider(s).

> Negotiation of fees and contract terms and conditions with providers of legal, accounting, and fiduciary services.

> Links and management of relations with attorneys specialized in other areas like migration, real estate, and others, or practicing in jurisdictions where we have no direct activity.

> Constant advice and support from our most experienced professionals.

> Review of the financial strategy defined by the client's own financial advisors, in order to ensure the best tax efficiency possible, as well as consistent overall wealth planning.

> Review of the family strategy concerning life insurance.

> Permanent assessment of international wealth structures.

> Ongoing monthly strategic consultancy for international legal, fiduciary, and tax issues, defined after the initial meeting with each client/family.

> Care for our client's privacy.

WHAT WE <u>DO NOT</u> DO?

> Our work does NOT replace at all the duties and tasks carried out by your financial advisors and even local legal and accounting advisors. It is a supplement to such activity.

> We do not participate, in any way, in our clients' investment decisions. Our goal is to work as a team to ensure that each decision made is implemented as best as possible from the wealth perspective.

WHAT DO WE CHARGE FOR OUR SERVICES?

Our fixed fees are defined by:

> The complexity of the existing fiduciary structure and/or that of the residence initially intended.

> The number of different tax residences within the same family group.

> The family branches that will be served.

In no case does UNTITLED charge fees that have a direct, or even indirect, relationship with the assets of our clients. Fees are always the result of the added value we can provide and the type of work we are going to do.

WHAT MAKES US DIFFERENT FROM COMPETITORS?

> Unrivaled knowledge and experience in wealth planning and international taxation.

> Our own research teams.

> Comprehensive approach.

> Fixed fees, unrelated to our clients' assets or profits, and regardless of hours of work.

> Customized assistance, available on a 24/7 basis.

> No conflicts of interest.

> Links to legal, accounting, and fiduciary experts in other jurisdictions of significance for our clients, where we have no direct activity.

> Reduction of fees charged for outsourced services, through negotiations and simplification or reduction of tasks.

> Fees for additional services provided by Untitled are charged at wholesale prices (i.e. incorporation of partnerships, the definition of trusts, etc.

> Preferential fees on international concierge services based on our agreement with Alberta La Grup.

> Assistance with family governance issues through our agreement with FECIG.

> Permanent innovation.

To schedule an initial diagnostic meeting contact Mr. Martin Litwak at martin.litwak@untitled-slc.com and/or Florencia Scialabba at florencia.scialabba@untitled-slc.com.

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