



VOGEL CONSULTING
 MAKING WEALTH MANAGEABLE®

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A Client-Centric Approach

Our Firm: AUA: \$2.4 Billion

Founded in 1993, we are a multi-family office dedicated to providing solutions to complex financial and family issues. Through our unique integration-led wealth management® program we will responsibly protect, build and manage wealth for present and future generations. Our client-centric approach ensures each client receives customized services designated to meet their unique objectives. We are most frequently hired to:

- Integrate top-notch investment, tax and estate activities
- Become the CFO for families
- Solve complex business, personal and family wealth issues

Contact: Thomas E. Meilinger, Managing Director

Unique Features

As an independent company, Vogel accepts payment from only one source – the client – and accepts no other means of compensation. Most clients elect to be billed for only the services they use on an hourly fee basis. Work projects are managed using state of the art software which tracks single or recurring projects, establishes timelines, tracks progress, monitors staff and prepares management and billing reports. This management efficiency offers better results and lower fees.

Strengths

- Business Consulting
- Tax Consulting and Preparation
- Trust and Partnership Accounting
- Estate Structuring
- Investment Advisory and Performance Reporting
- Family Education and Meeting
- Single Family Office (SFO) Back Office Support

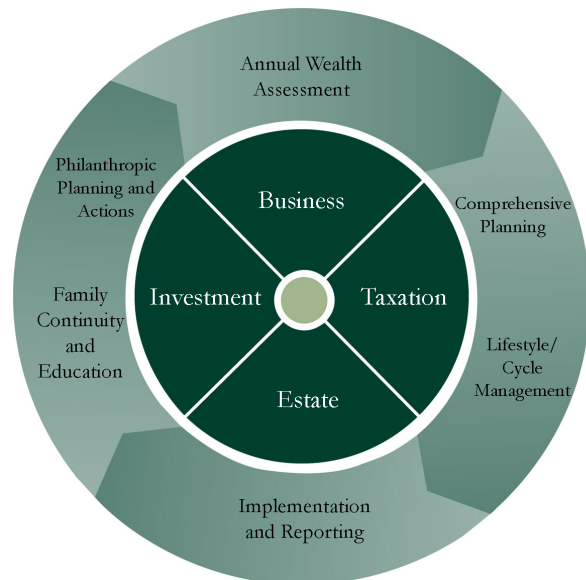
Our Typical Client

Nearly 54% of our current clients own and operate private businesses. We work exceptionally well with liquidating and non-liquidating family business owners. Our families are located in numerous states but concentrated in Illinois, Wisconsin, Florida, Ohio and New York.

- Generations Served: G1-G4
- Net Worth: \$50 Million+

Integration-Led Wealth Management®

Our disciplined management process utilizes all forms of human, social, intellectual and financial capital available to a family and matches this capital with best-in-class solutions.



Attributes Our Clients Desire from Us

- Independent, non-conflicted advice
- Professional trust
- Seasoned expertise in multiple disciplines
- Ability to serve all family members
- Ingenuity and creative solutions