



ROUNDTABLE  
*Family Office Network*



# CEG Worldwide has joined forces with Russ Alan Prince, a leader on family offices, to assist Roundtable members in providing

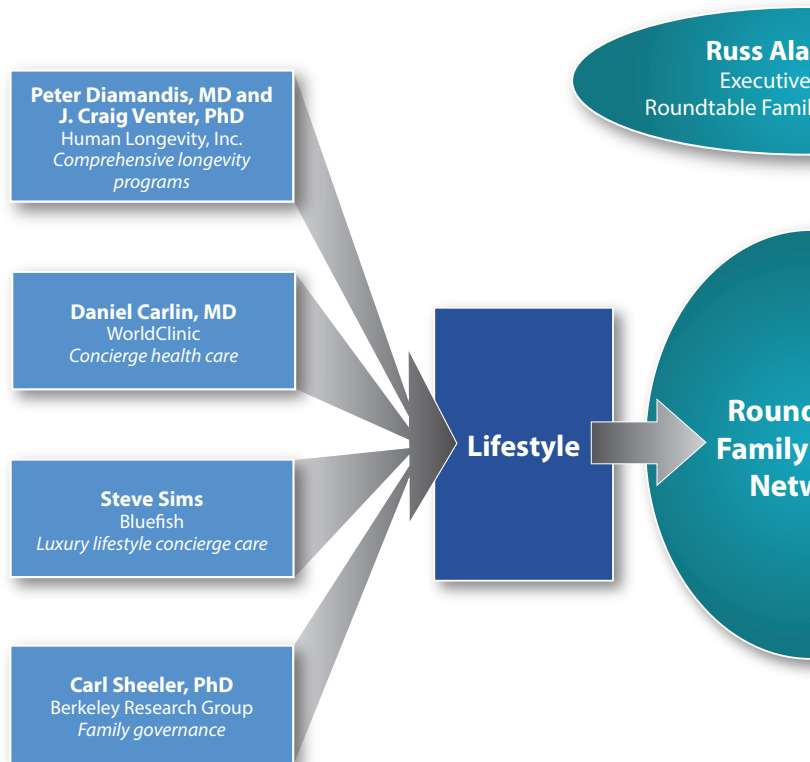
As investment management becomes ever more commoditized, you must find new ways to serve and add value to your ultra-affluent clients. The Roundtable Family Office Network enables you to provide the entire suite of family office services to these clients without the expense of building and running your own family office.

## Lifestyle services

Health and human longevity programs, concierge health care, luxury concierge care and expertise in family security—the Roundtable Family Office Network offers these services and more to ultra-affluent clients. It will become your source for the premium services these clients need to support their preferred lifestyle.

## Advanced planning services

The financial challenges of your ultra-affluent clients range far beyond investment management. The Roundtable Family Office Network includes the top experts in every area of advanced planning and coordinates their work through the National Advanced Planning Desk. With the Roundtable Family Office Network, you will be able to help your clients effectively address even the most complex financial issues.



# Building authority on the ultra-affluent and international expertise adding family office services to your ultra-high-net-worth clients.

**Russ Alan Prince**  
Director,  
Family Office Network

**Roundtable  
Family Office  
Network**

**Advanced  
Planning**

**Edward Renn**  
Withers Bergman  
*Domestic and international  
planning for private clients*

**Frank Seneco**  
Seneco & Associates  
*Life insurance for domestic  
and international  
high-net-worth clients*

**R. Wesley Sierk**  
Risk Management Advisors  
*Captive insurance company*

**Douglass Lodmell**  
Lodmell & Lodmell  
*Asset protection*

**Heather Maki**  
Darton & Company  
*Personal P&C insurance for  
high-net-worth families*

**Peter Sasaki**  
CGS Financial Solutions  
*Private placement life insurance  
and variable annuity platform*

**Richard Flynn**  
FFO Business Management  
and Family Office  
*Administrative and family  
office support services*

## How to access the network

Access to the Family Office Network is available to every current Roundtable member.

- Lifestyle services.**

Each of the network's lifestyle services experts will offer a platform that will enable you to directly access their services for your clients. There may be a nominal charge for access to some services. For more information, visit [www.roundtablefamilyoffice.com](http://www.roundtablefamilyoffice.com).

- Advanced planning services.**

Access to these services is exclusively through the National Advanced Planning Desk, managed by Russ Alan Prince. To use the Advanced Planning Desk, you must have the ability to share life insurance revenue. Clients must have a minimum of \$25 million in investable assets for their cases to be handled through the Advanced Planning Desk. For more information, visit [www.cegworldwide.com/e/planning-desk/introduction](http://www.cegworldwide.com/e/planning-desk/introduction).

In addition, you will enjoy many opportunities to gain specialized knowledge in each of the lifestyle and advanced planning areas. These will include presentations and breakouts during Roundtable sessions as well as invitation-only webinars.



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