



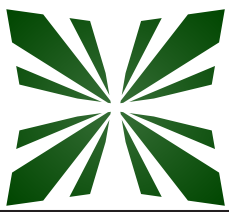
# NABCAP

*Adding Transparency to the Financial Services Industry*



**TFO Phoenix**  
The Family Office

Premier Advisors of  
***Arizona***




# TFO PHOENIX

THE FAMILY OFFICE



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 Advisory Practice	Avg. Assets Under Management Per Client	Avg. Number of Clients Per Advisor Advisors to Support Staff	Credentials Top Five Specialties	City State Phone
Firm Name				
<b>TFO Phoenix</b> <u>The Family Office</u> TFO Phoenix	<b>\$15,000,000</b>	<b>5</b> <u>15:5</u>	<b>CFP, CPWA, CFA, CAIA</b> <b>FP, FS, EP, CM, AM</b>	<b>Phoenix</b> <b>AZ</b> <b>602-466-2611</b>



The primary focus of NABCAP, a nationally registered 501(c)(3) nonprofit organization is to serve the needs of the investing public by helping identify top wealth managers. NABCAP and its Board of Directors created an unaffiliated evaluation process in which 20 categories of practice management are assessed. Advisors are invited and/or nominated to participate by submitting an online questionnaire. The multi-step verification process utilizes independent resource to assess the accuracy and truthfulness of the information submitted by participating advisory practices. NABCAP's methodology is unique in deciphering advisors because it is primarily objective, not subjective and helps add transparency of the investor's benefit.

NABCAP takes pride that their list of Premier Advisors is not merely defined by Assets Under Management (AUM), revenues produced or even worse, popularity. Alternatively, NABCAP attempts to identify top advisors regardless of size, firm or channel they are affiliated with. The ultimate goal is to provide investors and advisors a trusted standard of excellence to help guide them within the Financial Services Industry.

Through our process the investing public will clearly identify practice specialties and areas of excellence. NABCAP strives to create a platform and process through which transparency becomes both the expectation and the industry standard. The investing public requires advisory practice to be in line with their needs and goals.

[www.NABCAP.org](http://www.NABCAP.org)

TFO Phoenix, Inc. Third Party Recognition Disclosure: 2013 NABCAP Premier Advisor Re-Print. Third party rankings and recognition from ratings services are no guarantee of future investment success. Working with a highly rated adviser does not ensure that a client will experience a higher level of performance or results. Ratings should not be considered an endorsement of the advisor by any client nor are they representative of any one client's evaluation. A disclosure of the criteria used in making these rankings is explained in the materials.