

Caddis LLC

WISDOM

Wisdom is the intersection of experience, knowledge and good judgement

CADDIS LLC




The Daily Distractions

Recession, inflation, rising interest rates, collapsing crypto currency firms, cold war with China, Russia-Ukraine war: all of these things contribute to the challenges facing families who NEED to invest to fulfill their family obligations and pursue their family purpose.

Many families struggle to successfully manage their outcomes regarding their family obligations: paying down their mortgage, funding their retirement, putting their children through college, etc., because the noise of day-to-day challenges often defeats their own strategies. Until now, only the very wealthy have had access to the solution - a family office.





Only very seasoned advisors, estate planning attorneys, accountants, and property/casualty risk managers can qualify to be part of a digital family office experience. Most of these professionals have relied on referrals to build their business. ***That becomes very challenging during recessions.***

The digital family office is for professionals who have moved past the "growth" phase of their careers and are now focused on restoring their time. Often, they seek more profitable business relationships and raise the bar for their minimum standards. This is referred to as the "maintain" phase of their careers. The "exit" phase is rarely well planned. Caddis LLC can help these professionals increase the value of their business by reducing the average age of these clients while remaining focused on wealthier families as clients.

The Wisdom program is a community of seasoned advisors who have successfully mastered the key elements of the digital family office. Many advisors who have benefited from this training experienced a moment of serendipity as an immediate result. **The record currently stands at \$60 million in 90 days.** *Who is ready to break it?*

Serendipity: Combining a fortunate accident with Wisdom.





THE CHALLENGE THAT COMES FROM COMPLEX FAMILY ISSUES IS INVIGORATING

Unlike some programs that ask participants to swim with sharks or walk across hot coals, Wisdom is all about cultivating an environment where professionals solve the challenges facing wealthy families. By creating a digital family office experience in the Wisdom program, each professional has their unique discipline and contributes to the family's successful outcome. Each professional holds the others accountable for the family's benefit. ***Here is a sample case study:***

I am the Chief Technology Officer of Cox Cable company in Greenwich, CT. I earn \$400,000 per year. I am married with three children (5,9, 13). I belong to the Greenwich Country Club (\$25,000 per year), all of my children are in private schools (\$75,000 per year), and I own a \$4.5 million home with about 30% equity. I have \$800,000 in investments and plan on working for 20 more years. My financial advisor is with Morgan Stanley and he manages \$300,000. He has the money invested in a laddered bond portfolio. I also have \$500,000 with a friend of mine who is a hedge fund manager. Even though the minimum is usually \$1 million, he let me in because I am his friend. The strategy is Macro Long/Short and has not performed well in the last five years. I am generally a bullish investor and am seeking alpha. My spare time is spent playing golf, tennis, and serving on the board of the local Red Cross chapter.

What discovery questions would you ask?

What words would you use to motivate an honest participant in the process?

Is there any constructive criticism you could offer from the details provided?

The Founder



Jeff Mount, President/CEO

25 years as a top business development
executive in financial services

2013 Innovator of the Year

Closed the largest Charitable Remainder Trust
in Manulife history

ACHIEVE WISDOM IN JUST TWO DAYS!



Yesterday

Where is my next referral
coming from?



Tomorrow



- **Marketing**
- **Sales Coaching**
- **Public Relations**
- **Social Styles training**
- **Diagnostic Sales**
- **Lead Generation**

The path to guaranteed growth