

# ELITE FAMILY OFFICE

Subscription Investing | Family Office Access | Financial Literacy

## Subscription Investing

Members enjoy access via a simple monthly subscription:

- All-inclusive subscription for access to our Model Portfolio and any/all updates;
- Members have complete control of their assets in their own personal/corporate brokerage accounts;
- We don't take custody of your capital, so it is safe and secure in your own account;
- Our initial subscription term is one (1) year, renewable on an annual basis;
- No variable or hidden costs, commissions or management fees; and
- We work with all financial institutions

## Family Office Access

- Our members enjoy access to our referral network for support when it comes to buying/selling your business, managing and planning your taxes, strategies to help you better pass wealth to the next generation or charities and related services to help you make better decisions.

## Financial Literacy for Q1 2024

As we embark upon a brand new year, we renew our commitment to increasing the level of financial literacy of our members, their families, friends and colleagues. Please feel free to share as you wish and we look forward to hearing your comments:

### **The Ascent of Money.**

Dr. Niall Ferguson follows the money to tell the human story behind the evolution of our financial system, from its genesis in ancient Mesopotamia to the latest upheavals on what he calls Planet Finance. What's more, Dr. Ferguson reveals financial history as the essential backstory behind all history, arguing that the evolution of credit and debt was as important as any technological innovation in the rise of civilization. As Ferguson traces the crisis from ancient Egypt's Memphis to today's Chongqing, he offers bold and compelling new insights into the rise and fall of not just money but Western power as well.

**Link:** <https://youtu.be/2XX2b2MeDe0?si=w9YqYIJZmT3kuNmr>

### **Becoming Warren Buffet.**

This is perfect to watch with your family and the first 10 minutes are legendary.

Warren Buffett is truly a one-of-a-kind billionaire. The legendary investor still lives in his modest home in Omaha. At 86 years old, he drives to the office every morning to manage Berkshire Hathaway, the fifth largest public company in the world. But more surprising than his humble lifestyle is his moral core. The same principles of decency and integrity that helped him pile up a fortune led him to give it all away in the largest philanthropic donation in history.

Becoming Warren Buffett chronicles the evolution of a boy from Nebraska who became one of the most respected men in the world, and the heroes who helped guide him along the way. By allowing access to his life and never-before-released home videos, Buffett offers a glimpse into his unique mind to help us understand what is truly important when money no longer has meaning.

**Link:** <https://youtu.be/PB5krSvFAPY?si=p6iwOh8Rcr12xeG6>