What Our Clients Have to Say

"I came to the Legacy Foundation for assistance after my husband passed away. I signed up for the Family Office Service, and have found it to be a great relief. I know that my finances are being handled professionally by a team of dedicated and caring people."

"Paying bills and balancing my check registers is a blessing to have as a service in place at Shell Point."

"The Legacy Foundation's service is wonderful. My brother and I live out of state, but we don't need to worry about mom. Our visits are special because we can spend more quality time with her."

"The services offered by the Legacy Foundation are so liberating. They have unburdened us and made it so that we are able to enjoy more of the life here at Shell Point. We have no worries—the Legacy Foundation and the staff are wonderful."

ESTATE DESIGN SERVICES
•
PHILANTHROPIC COUNSEL
•
FAMILY OFFICE SERVICE
•
FIDUCIARY SERVICES AND ESTATE ADMINISTRATION

LEGACY FOUNDATION AT SHELL POINT

(239) 466-8484

15010 Shell Point Blvd. • Fort Myers, FL 33908
Fax (239) 466-2069 • www.legacyshellpoint.org

The Legacy Foundation at Shell Point recommends that each person should consult with his or her qualified advisors about their specific situation before making any decisions. This publication is intended to provide accurate, general information, not legal or tax advice.

We do not disclose any non-public personal information about our clients or former clients, except as instructed to do so by such individuals. We restrict access to non-public information to those professionals our clients request to assist in the completion of legal, tax and financial services. We maintain physical, electronic and procedural safeguards to protect a client's non-public personal information.

Family Office Service

TALK TO SOMEONE YOU CAN TRUST ABOUT YOUR FINANCES

LEGACY FOUNDATION AT SHELL POINT

How can we help you?

Family Office Services

As a client of the Legacy Foundation's Family Office Service, Shell Point residents receive a comprehensive package of financial services, including our customized bill-payment service to help meet current financial objectives more efficiently while securing their financial future.

Our clients appreciate the experienced and trustworthy guidance they receive from the Legacy Foundation staff in managing their day-to-day financial transactions. Since the Legacy Foundation is located within the Shell Point campus, it allows us to devote the personal attention to you that you deserve.

The Legacy Foundation can also be your guiding resource as:

Estate Philanthropic Counsel

- A complimentary review of your current estate plan and advance directives
- Encouraging philanthropy as a personal and cultural value
- A source for wealth, gift and estate transfer strategies

Trusted Advisors

- Hosting financial educational seminars
- Coaching people in their personal financial affairs
- A referral source to trusted financial advisors, tax counselors and attorneys

Frequently Asked Questions

1. How does the Family Office Service work?
Once contacted, our staff meets with you to discuss how our services will meet your needs. If you are interested in securing our services, we start immediately. There is a monthly fee for our services.

2. What benefits are included in the Legacy Foundation's Family Office Service?
The Service is customized to meet your individual needs. Our program includes:

- Writing checks and timely payment of bills
- Reconciling of bank statements
- Providing clients with monthly statements
- Tracking all income, expenses and investments
- Calling vendors regarding invoices and any issues that need to be resolved
- Paying quarterly estimated income tax as instructed by your tax professional
- Preparing tax information, including gathering 1099s and end-of-year financial statements, to be sent to residents' tax professional
- Printing a yearly detailed list of checking account transactions
- Safeguarding important documents
- Notary services

3. Will the Legacy Foundation continue to use my current advisors once I am utilizing the Family Office Service?
Yes, you will continue to use your own tax and legal advisors, including financial advisors, bankers, and other professionals. Upon request, the Legacy Foundation can provide a list of professionals you may consider using – but you make the final decisions.

4. What about confidentiality?
We are careful, in today's society, to protect your private confidential information.

5. How will I know what my financial picture looks like?
Following a reconciliation of your monthly bank statement, we will mail a summary of all transactions and a copy of bank statements to you or your designee. The monthly summary report is an itemized list of all income and expense transactions in an easy format to view.

6. What if I need to discuss my finances with you?
Simply contact the Legacy Office or stop by to make an appointment. **The Legacy Office phone number is (239) 466-8484.** The Legacy Foundation hours are from 9 a.m. to 4 p.m.

7. What is the relationship of the Legacy Foundation to Shell Point Retirement Community?
The Legacy Foundation is a nonprofit "supporting organization" to The Christian and Missionary Alliance Foundation, with its own Board of Directors and operates as a 501c(3) designated charitable organization. The Foundation functions separately from Shell Point Retirement Community.

To learn more or schedule a complementary consultation today, call us at:

(239) 466-8484