

CONFIDENTIAL

A CFO who has, preferably, had very senior (CFO) financial experience in a family office with complex private holdings and sophisticated trusts and estates planning. This person will also have robust experience in financial reporting and creating and using accounting systems and attendant reporting.

Experience with planes and boats, both from an ownership and chartering perspective is also important as is experience with real estate purchase and construction, HR and IT. In addition, multi-generational experience will be helpful but not required as will be experience with foundations. Finally, as the family makes more private investments, partnership, LLC and corporate accounting and investment structuring is also important.

This person should be a hard worker, a good manager and an excellent communicator. He or she should be fully conversant with tax issues and tax accounting, particularly in the partnership and trust areas. Deep tax expertise will be provided by outside experts. This person will be extremely well organized and will have demonstrated a meaningful expertise in all facets of family office financial affairs.