

Helping You Live... Your Exponential Life™

1. Financial/Life Practice Model
2. MyVFO™ Technology Platform
3. Gladiators In Suits™ Service Mindset



Exponential Life is an objective unique to every individual. It is a continuous journey to grow and thrive by improving all aspects of business, family, and finances in a world of constant change. Lexington Financial/Life Management is a virtual family office (VFO); together with our collaborative team of independent professionals, we provide comprehensive strategies to solve complex problems with real-life solutions. *We're Gladiators In Suits™ and we stand with you to fight for your vision of Exponential Life.*

Our Unique Practice Model: Financial/Life Management™

Lexington Financial/Life Management is a team of diverse professionals who are committed to working together to find the very best comprehensive solutions for our clients. We bring our collective skills and experience, along with our LEX VFO Team and your current advisors to provide a 360-degree Financial/Life solution platform. This solution-based focus means that our clients feel confident in knowing that expertise is shared within our team so that one solution doesn't create problems elsewhere in their strategy. We look at all aspects of your situation in an effort to determine the best combination of preferred outcomes in your holistic Financial/Life Ecosystem.



Our unique Financial/Life practice model considers all aspects that work together to create the financial strength and stability to provide the lifestyle you desire today and tomorrow.

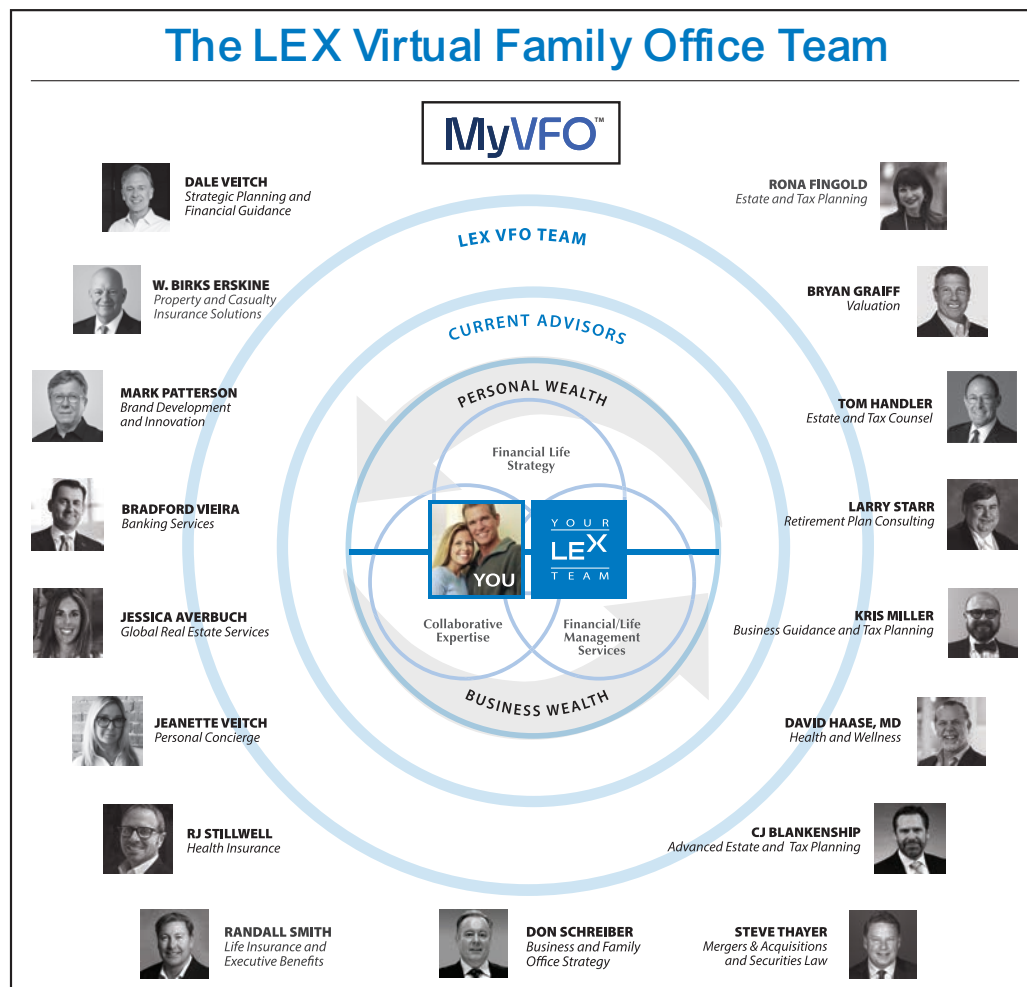
FINANCIAL GUIDANCE AND LIFE MANAGEMENT SERVICES

At Lexington Financial/Life Management, we believe that your wealth is an ecosystem and certainly more than just your liquid assets. Our approach looks at all of your assets comprehensively to ensure that your assets are aligned with your goals.

In addition, we provide a range of services to help you discover, define, and live your Exponential Life.

Our team of professionals work together to provide:

- Collaboration and Coordination with Internal and External Advisors
- Financial and Estate Planning
- Business Planning and Valuation
- Business Audits
- Bill Payment and Financial Reporting
- Real Estate Services
- Investment Consulting Private and Institutional
- Asset Preservation
- IT Support and Security
- Insurance Consulting and Captive Solutions
- Charitable Planning and Giving
- Consolidated Wealth Reporting
- Debt Structure Analysis and Negotiations
- Retirement Plan Formation and Administration
- Elder Care Consulting
- Performance Reporting on Liquid and Illiquid Assets
- Tax Planning and Preparation
- Personal and Family Branding
- Personal Concierge Services
- Concierge Healthcare



Our Proprietary Technology Platform: MyVFO™

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MyVFO is a fully responsive web platform, redefining wealth and life management for affluent families and their advisors. It combines world-class financial and life management tools to offer unparalleled efficiency.

With artificial intelligence at its core, MyVFO streamlines time-intensive processes, while its advanced communication and collaboration tools enhance transparency.

Upholding the highest standards of privacy, MyVFO ensures peace of mind in every aspect of Financial/Life Management.

MyVFO

The Connected and Collaborative Platform for Financial/Life Management



Our Service Mindset: Gladiators In Suits™

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It's a tough world and it isn't getting any easier. Continuous change and growing complexity make it too much for you to handle on your own and no single advisor has the depth of experience or the bandwidth to help you at the level you need. You need a comprehensive, holistic perspective to help you achieve your financial objectives and life goals. You need more. You need Lexington Financial/Life Management.

LEX Gladiators™ stand with you to fight for your future to help you live your Exponential Life.

GLADIATORS IN SUITS™



Our Vision to Facilitate: Exponential Life™

Lexington Financial/Life Management, is leading change in financial services. The three pillars of our business are:

1. *Our Financial/Life Practice Model*
2. *Our MyVFO™ Technology Platform*
3. *Our Gladiators In Suits™ Service Mindset*

We provide the right people, the right technology, and the right processes to solve the complex problems of business and life in today's changing world.

We are a group of innovative thought leaders who bring our combined talents to serve our clients with a deep bench of capability and visionary guidance.

Exponential Life is an objective unique to every individual. It is a continuous journey to grow and thrive by improving all aspects of business, family, and finances in a world of constant change. We're Gladiators In Suits™ and we stand with you to fight for your vision of Exponential Life.



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GLADIATORS IN SUITS™



Our Model

Our Mindset

Our Platform

LEXINGTON™
FINANCIAL/LIFE MANAGEMENT

Strategies For
Exponential Life™