



## Terms of Purchase for the Family Offices Database

**Definition of Family Offices:** Family Offices are defined as institutions that explicitly state an offering of family office wealth management services. These offices include single family offices, multi-family offices, and large wealth management firms with family office service divisions. The family offices in our databases have opted-in to be included in the database or made an indication through posting their details online to be included in the data sets we offer.

**Refunds:** Any entry that is determined to be outdated (invalid), or does not fit the above definition of a family office, will result in a pro-rated refund for 4x your money for that entry or entries. For example, if 10% of the database is made up of non-family offices the client is to receive a 40% refund on their purchase.

**In order to receive this refund,** you must let our team know exactly which entries are in error so we can continue to improve this resource. No refunds are provided without feedback on what was wrong with the database. This is our commitment to delivering a highly valuable product to you. The refund period will expire when a new version of the directory is released.

**Use of Data for Mass Mailings:** Family offices are valuable investor contacts and should be treated as such, we do not recommend mass mailing them via email for multiple reasons 1) It comes off as impersonal and is simply not effective we believe 2) Emails that we have confirmed are accurate and get responses from for a one-off direct email will bounce or show as a “bad email” when using a blast mail/email service because of BCC, SMPT, and re-routing of emails for some of the emails in our database which is normal corporate use and setup of email addresses, but will make your mail carrier think some of these emails do not work. If you use our database for sending out emails through a mass emailer such as Constant Contact, Mail Chimp, Aweber, Infusionsoft, Salesforce, etc. where you are blasting 100+ professionals at a time expect it not to work technically and practically and you will not be due a refund for any feedback on emails being “bad” for use through a mass mailing system. Please read our books, whitepapers and watch our videos on effective investor communication and connecting with investors to generate real relationships with them.

**Ongoing Updates:** Your package of database may come with 1 free update, otherwise updates cost \$995 a year going forward after your initial purchase for our standard off-the-shelf databases and 50% of the cost of purchase for smaller geographically focused or bespoke/custom family office database packages.

**Terms of Use:** Each version of the Excel-based Family Offices Database has been invisibly marked, is protected, and contains copyrighted material. Any duplication, extraction, or use in commercial ventures is strictly prohibited.

That said, this database is provided within Excel format and the time length term of use is unlimited. This database does not expire and access to these details within Excel is never blocked after any length of time.

If you have any questions about our terms of use here, or about the database, please feel free to get in touch. We are in our Key Biscayne, Florida offices Monday through Friday, from 9:00AM to 5:30PM EST. You can reach us at (305) 677-3327.