

The logo features the letters 'SFO' in a white, serif font. Behind the letters is a geometric design consisting of several thin, white lines that form a series of overlapping triangles and diamonds, creating a complex, crystalline structure.

SFO

Family-Centric Wealth Management™

FIRST PRINCIPLES
FRAMEWORK

words WE live by and have put into practice

A large, abstract graphic at the bottom of the slide. It consists of a dense, cloud-like mass of small, light-blue particles or dots, which are more concentrated in the center and fade out towards the right and bottom edges.



Family-Centric Wealth Management™

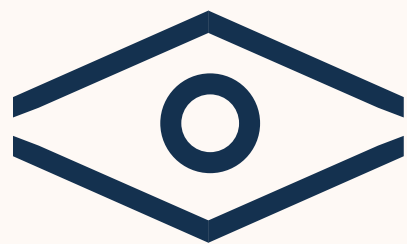
FIRST PRINCIPLES FRAMEWORK

Reasoning from first principles.
Our proprietary framework defines
4 key principles to design a family-centric
approach to wealth management.

AFFINITY IS PIVOTAL

sfo

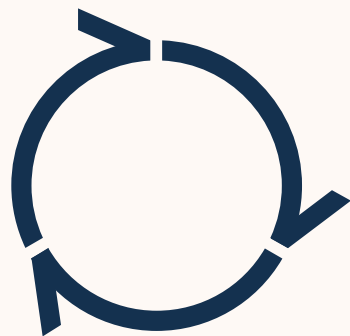
FIRST PRINCIPLES FRAMEWORK



OVERWATCH

Family Governance

Schmidt Family Office
SFO Research (CH)



CONTINUITY

Trust & Fiduciary

SFO Trust
SFO Trust (CH)
SFO Law



PERFORMANCE

Assets

SFO Financial Solutions
SFO Investment Management
Core Global Solution **SFO / EDGE**



CONFORMANCE

Admin & Compliance

SFO Private Clients
Fidufin
SFO Red

sfo

SCHMIDT FAMILY OFFICE

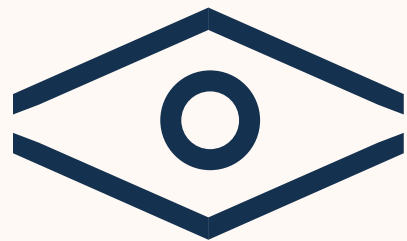


PRACTICE AREA



BUSINESS + SERVICE UNITS

FIRST PRINCIPLES FRAMEWORK



OVERWATCH

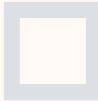
Family Governance

Schmidt Family Office
SFO Research (CH)

Overwatch is about interpretation [seeing] the total picture and overseeing the implementation and management of family strategy across all functions of the wealth management mandate



PRACTICE AREA



BUSINESS + SERVICE UNITS

FIRST PRINCIPLES FRAMEWORK



Trust & Fiduciary

SFO Trust
SFO Trust (CH)
SFO Law

Continuity is about [ongoing] ownership
of assets and maintaining the infrastructure
that holds the assets of a family

FIRST PRINCIPLES FRAMEWORK



Assets

SFO Financial Solutions
SFO Investment Management
Core Global Solution SFO / EDGE

Performance is about [growth] managing financial capital as an enabler for families to meet their objectives and flourish

FIRST PRINCIPLES FRAMEWORK

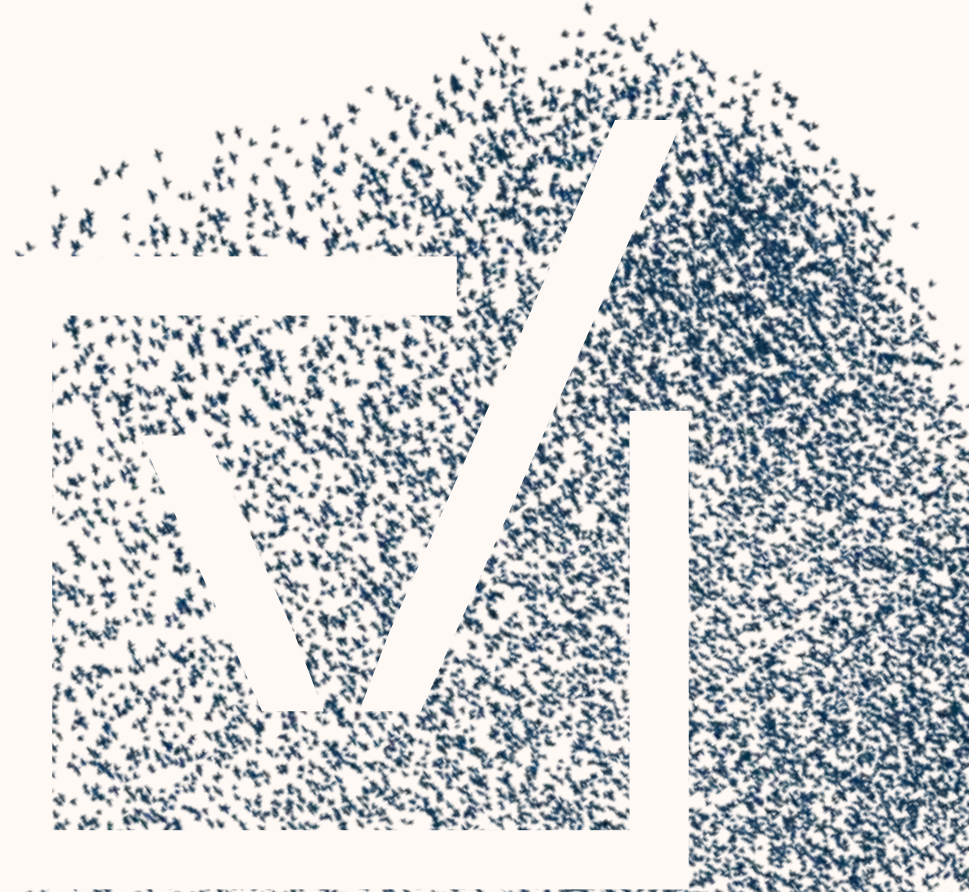


CONFORMANCE

Admin & Compliance

SFO Private Clients
Fidufin
SFO Red

Conformance is about [sound]
administration and proactively managing
a family’s risk by centralising wealth
administration services



sfo