ABOUT LAURA TARBOX

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2020 marks Laura's 40th year in financial planning. A UCLA graduate, Laura received her CFP in 1984 and founded her firm in 1985. Tarbox Family Office, Inc. is located in Newport Beach, CA and employs a team approach in offering comprehensive wealth management services to a small group of families with $5 million or more of investable assets.

Laura has served on both the Charles Schwab and TD Ameritrade Institutional Advisory Boards, the CFP Board of Examiners, the National Board of the Institute of Certified Financial Planners, and is a past President of the Orange County Society of the ICFP. She has been part of the adjunct faculty of the College for Financial Planning, USC and California Lutheran University, and taught financial planning classes in the certificate program at UC Irvine for 20 years, where she was the Program Director. Laura was chosen from over 800 UCI Extension instructors to receive the Distinguished Instructor Award in 1997 and is the founding Dean of the UCI / CFP Residency Program, a week-long case study program for new CFPs.

Frequently featured in the local and national media as an expert on financial planning and investments, Laura has been retained as an expert witness in insurance and investment cases. She is a California Licensed Professional Fiduciary and a private trustee on several trusts.

Laura has volunteered her leadership and financial skills for organizations including *Foundation for Financial Planning, Laguna Beach Community Foundation, Laguna Canyon Foundation, Laguna Beach Schoolpower Endowment, and Child Aid.*

Laura Tarbox has been recognized as one of the "Best Financial Advisors" in the country by Worth magazine and was named one the country's "100 Great Financial Planners" by Mutual Funds magazine.

ABOUT TARBOX FAMILY OFFICE

(949) 721-2330
www.tarbox.com

Tarbox Family Office is a fee-only wealth management firm, and is registered as an Investment Advisor with the SEC. Fee-only means that we do not take any commissions, trails, referral fees, or "kickbacks" from *any* sources. We work for, and are paid by, *only* our clients.

We work with a small number of families. Our multiple-credentialed staff works together as a team to provide comprehensive wealth, investment management, and family office services.

Because each of our clients has a unique situation, fees are quoted on an individual basis, after an initial meeting. Generally, comprehensive fees will range from 0.30% to 0.75%, and will be based on investable assets or total net worth, depending upon services required.

Investment management services are available to clients that meet our minimum account size of $5,000,000.

Wealth management and financial planning are provided at no charge to our investment management clients. We normally do not offer wealth management or financial planning services on an hourly or project basis to non-clients.