

FREQUENTLY ASKED QUESTIONS

Q. How can I determine the return on my investment (ROI) by implementing a FLO™?

A. Just ask for our "FLO™ Benefit Calculator" so you can determine for yourself an estimated ROI.

Q. What do you mean by Da Vinci being independent and serving as my 'advocate'?

A. Da Vinci is an independent consulting firm, meaning we are committed to serving the best interests of our clients. We are **fiduciaries**. While we work **collaboratively** with other professionals, our compensation is **solely derived** from the clients we serve. We always provide **objective advice** and serve as our client's **advocate** in all matters. Da Vinci **doesn't develop, manage, or sell** investments, insurance, or other financial products. Da Vinci **doesn't offer** legal, tax, accounting, valuation, M&A or other related financial services.

Q. I have a great team of professional advisors and consultants that have worked with me, my family, and our business for years. If I retain Da Vinci, will you expect me to change advisors?

A. No, absolutely not. If anything, your existing advisors and consultants will become even more important, valuable, and will operate more effectively and efficiently on your behalf. However, for the FLO™ concept to provide you with optimal outcomes, it is dependent upon your advisors **working together in a professional, cooperative, and collaborative manner**. If one of your advisors fails to act in such a manner, you will need to determine an appropriate course of action.

Q. I see that Da Vinci offers a Family Life Office™ and a FLO Lite version that have significantly different minimum fees. Please help me understand the fee disparity.

A. All Da Vinci fees are based upon a **combination of factors** including: *hourly rates of the professionals and staff providing services, value created, client expectations, and costs and materials*. Plan minimum fees are based on what Da Vinci believes is the **least amount** it can reasonably charge to provide the **client experience and services** described for each plan. **Actually fees will vary** based on each client's preferences and levels of service requested. Da Vinci will prepare a firm FLO quote at the conclusion of the **Life Check-Up** phase, which is quoted as a **stand-alone service**.

Q. Da Vinci provides a set number of service hours for FLO™ Lite Foundation Services. Do I get 'dinged' by the minute if I ask for help after the allocated hours for the month are used up?

A. No, you are **NEVER** charged for any services that you haven't agreed to in advance. FLO™ Lite Foundation Services are provided for a **set fee for a given volume of work** each quarter. If you desire more services than the hours that are allocated, we will **propose an adjustment to our monthly fee** for your approval. Another way we may accommodate a request is to provide more services in one month and less the next month (e.g., *you take a month-long vacation and don't want to be bothered*).

Q. I really like the idea of starting with a basic Foundation for my FLO with the option to add and subtract Module Components as my needs and circumstances change. Explain how this works?

A. In today's ever-changing world, Da Vinci is providing **maximum flexibility and customization to accommodate any situation and budget**. That's why we developed our FLO™ Foundation Service along with **Family, Ownership, and Business Components**. When a *component* is added, we **determine the degree and level of service** you require. Then, we **quote a monthly fee** based on the approximate hours and other resources we estimate are necessary each month to accomplish your goals and objectives. With your **acceptance**, the fee for the additional service is added to your monthly fee and the work begins.

Q. How are meetings handled if our Da Vinci CLO or advisors live in a different cities?

A. You are provided options. All meetings can be efficiently handled by **video conferencing with desktop sharing**. This type of communication technology is **built into your "FLOtech™" site**. You can request that your Da Vinci *Chief Life Officer* and other consultants attend meetings in-person. **Reimburse for reasonable travel expenses** will apply.

Q. Once I become a Da Vinci Family Life Office (FLO) client, can I terminate the service at any time? If so, how does that work?

A. Yes. You can terminate Da Vinci's FLO services **at any time** by any form of written notification. Termination will occur at the **end of the following month** Da Vinci receives **written notification**. Clients are responsible to pay for any services rendered above and beyond that which was prepaid for the final month services are provided.

Q. If I terminate Da Vinci's FLO services, am I still able to access our family's "FLOtech™"?

A. Yes. You have **two choices: (1)** Copy as much information as you would like from your site before the end of the termination month, or **(2)** Continue as just a "Da Vinci FLOtech™ client for a reasonable monthly fee until you **either choose option (1)** above or **decide to re-engage** Da Vinci FLO Services. Those in your family that are users of the site (*i.e.*, have FLO email accounts) are **granted permission** to continue to use Da Vinci's intellectual property **solely for personal use**.