teresa leigh
household risk management

COMPANY PROFILE

High net-worth families are busy. Their calendars are full and their lives move fast, often between three or more households. That is why they employ staff, housekeepers, nannies, and groundskeepers, to help keep things on track. But what happens when the staff they hired to make things easier actually make things more difficult?

Household management for the affluent is a complicated and high-risk endeavor. Families that attempt to navigate these waters on their own can unknowingly expose themselves to financial risks, security risks, and negative publicity.

WHO WE ARE

With over 28 years of experience managing the complexities of affluent households, Teresa Leigh Household Risk Management has developed a keen insight into the intimate lives and needs of those unique homeowners.

Teresa Leigh, the firm's founder and CEO, is a recognized industry leader and educator in this very specialized field. Teresa has written and consulted on numerous articles and white papers for publications, e.g., *Worth Magazine*, *Forbes*, *The New York Times*, and *Financial Advisor.*

WHAT WE DO

First, we listen. Then, we ask questions to determine the source of the distress:

- Is it finding the right nanny?
- Understanding staff turnover?
- Controling household expenses?
- High level of stress?

Once we understand the clients' concerns, we work quickly to solve the problem. Our singular goal is to give clients peace of mind and superior quality of life.

Our unique expertise gives us the specialized knowledge required to address client, employee, and subcontractor relationships. Whether we are setting up a new household, hiring staff, mediating disputes, providing human resources documentation, or creating order from chaos, we provide our clients with unbiased counsel and guidance.

Our time-tested methods enable us to quickly identify problems and risk areas and clearly communicate solutions to the client.

We work tirelessly to protect our clients by carefully vetting and referencing all who seek access. This approach allows our clients to live a better quality of life supported by advisors they can trust.

OUR TYPICAL CLIENT

Our clients are G1, G2, and G3 individuals or families, and newly affluent, high-profile clients.

OUR AREAS OF EXPERTISE

- Advisory Counsel
- Mediation
- Hiring staff for household, property, and the family office
- Personality, integrity, and skill testing of candidates
- Human resource management
- Federal and state employment law compliance
- Management of multiple households and properties

AT A GLANCE

We provide clients with the expertise to problem solve household and property-related concerns, and we offer clients a superior quality of life.

Years of Experience 28
Client / Advisor Ratio 4:1
Success Rate 98%

Provides client services nationwide.
Offices in Raleigh, NC & New York, NY

www.teresaleigh.com

DID YOU KNOW

During its lifespan, the average affluent household will hire as many as 160* subcontractors and vendors.

** TLHRM internal research and surveys*

Many families often mistake their Personal Assistants, Housekeepers or Nannies as independent contractors; however, the employment laws that regulate domestic workers dictate these positions to be treated as hourly employees.

Read "Hiring Summer Help"
Read "Nanny and the Tax Man"

Undocumented domestic workers in the US can litigate against their employers for, but not limited to: overtime pay violations, sexual harassment and wrongful termination.

Read "Domestic Employee Risk"

Employers are responsible for documenting and archiving employment records for each employee and may be required to produce substantiated documents upon audit.

Read "US Department of Labor"

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IN THE MEDIA

2013

Morgan Stanley Smith Barney
White Paper: Maintaining Harmony at Home:
Best Practices in Hiring and Retaining Household Staff

CNBC
Domestic Workers Employment Rights
Interviewed by Mr. Robert Frank

2012

Forbes
Secrets of the Help

New York Post
Welcome to Downtown Abby

Private Asset Management
Teresa Leigh Household Risk Management
Rolls Out New Services

CNBC
How Your Household Help Puts You at Risk

Atlantic Trust: The Advisor
Teaching Your Family Financial Self-Defense
White Paper: Household Management Exposure:
You are an Employer

Family Office Review
Keeping in Line

New York Times
Color the 1 Percent 99 Percent Conflicted

Worth Magazine
Expert Advice: Lifestyle

2011

Investments & Wealth Monitor
How the Rich Get it Right

2010

Worth Magazine
10 Questions for Your Personal Chef
6 Questions for Your Executive Assistant

2009

HUB International Personal Insurance
White Paper: The Domestic Staffing Cycle:
From Hiring to Firing

2007

Private Wealth Magazine
A Good Man is Hard to Find

SPEAKING ENGAGEMENTS

2011

Private Asset Management
Fall Event, New York, NY

Family Wealth Alliance
Spring Event, Chicago, IL

2010

Family Wealth Alliance
Alliance U, Chicago, IL

National Basketball Association (NBA)
Rookie Camp, New York, NY
Sports Agent Symposium, New York, NY

2009

Institute for Private Investors
Spring Forum, New York, NY

Family Office Exchange (FOX)
Financial Executives Forum, Chicago, IL

2008

LIDO Family Office Wealth Conference
Laguna Beach, CA

AWARDS & NOMINATIONS

2014

Private Asset Management Awards
Nominated for Best Multi Family Office Service Provider
Nominated for Best Single Family Office Service Provider
Nominated for Best Lifestyle Firm

2013

Family Wealth Alliance
Nominated for Best of the Decade Award for Security and Risk Management

Private Asset Management Awards
Nominated for Best Single Family Office Service Provider
Nominated for Best Family Office Service Provider-Client Services

2012

Private Asset Management Awards
Nominated for Best Single Family Office Service Provider
First Runner Up for Best Family Office Service Provider-Client Services