



teresa leigh

household risk management

## COMPANY PROFILE

Teresa Leigh Household Risk Management is an award winning and nationally recognized subject matter expert in the field of household and property management for the High Net Worth and Ultra High Net Worth families. TLHRM's client base is nationwide.

The average client is in excess of 500mm.

TLHRM is a privately owned boutique firm offering clients the highest level of personal service and confidentiality. Its founder, Teresa Leigh, has over 29 years of experience, and has authored numerous White Papers on the management and unforeseen risk of the UHNW household. Ms. Leigh is often quoted in: The New York Post, Worth Magazine, The New York Times, The Wall Street Journal and Forbes Magazine.

### DEPTH OF FIELD

TLHRM is the only firm that offers clients both Best in Class candidates and the expertise of a professional and state-by-state legally compliant Human Resources team.

When considering new staff, no other company can compete with TLHRM's meticulous background investigations and the multi-level skill testing of candidates. The TLHRM Ethonomics Testing Platform © is an unparalleled testing method developed by TLHRM especially for clients, measuring practicum skills unique to household and property staff and personality match testing.

### PROPERTY ACQUISITIONS, OPERATIONS & TRANSITION OF STAFF

TLHRM's expertise in creating effective and cost saving transitions of property and staff is well known. Offering clients a seamless 'change of the guard' when acquiring properties and deploying on the ground Human Resources staff when needed.

TLHRM is devoted to guiding and nurturing clients each step of the way for long-term employees and to help clients create a peaceful and mindful employment environment for all their household and property staff members.

### 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** 29  
**Client / Advisor Ratio** 4:1  
**Success Rate** 98%

**Provides client services nationwide.**  
Offices in Raleigh, NC,  
New York, NY & Palo Alto, CA  
[www.teresaleigh.com](http://www.teresaleigh.com)

### QUICK SERVICE LIST

Client Advisory and Support  
Lead Advisory Team Member  
Discovery  
Operational Staff Management

New Hires  
Skill Testing  
Background Investigations  
Human Resource Management  
Salary and Benefit Review  
Salary and Benefit Design by Skill Grade  
Time Off Tracking / SEP IRA  
Clothing Allowances, etc.  
Exits or Terminations

Bill Pay Systems  
Payroll Management  
Operational System Development  
Risk Assessments: Staff and Operations

Settlements on Wages or Benefits  
Human Resource Compliance  
Counsel for Employee Job Growth  
Mediation of Disputes  
Mindful Management



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## IN THE MEDIA

2016

### Wall Street Journal

*Security Risks Ultra-Wealthy Underestimate; Know and Train Your Staff and Travel Safely, Experts Say*

2015

### ACE

*White Paper: Managing the Risks of Employing Domestic Staff: How High Net Worth Families and Their Advisors Can Ensure a Safe and Well-run Household*

### ThinkAdvisor.com

*For the Wealthy, It's Hard to Find Good Help*

### Institutional Investor

*Staffing and Recruiting for the Family Office*

### Insurance.com

*Should Your Housekeeper be Bonded and Insured?*

2014

### Institutional Investor

*The Wealthy Can Pay a High Price for Skimping on Security*

### Morgan Stanley

*White Paper: Building Trust: Best Practices in Working with Vendors & Contractors*

### Wall Street Journal

*Security Risks Get Wealth Families' Attention*

2013

### Morgan Stanley

*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*

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## AWARDS & NOMINATIONS

2017

### Private Asset Management Awards

*Winner for Best Lifestyle Firm for High Net Worth Clients*

2016

### Private Asset Management Awards

*Nominated for Best Lifestyle Firm for High Net Worth Clients*

2015

### Private Asset Management Awards

*Winner of Best Lifestyle Firm for High Net Worth Clients*

### Family Office Review Awards

*Nominated for Family Office Specialty Services*

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 Mgmt.*

### Private Asset Management Awards

*Nominated for Best Single Family Office Service Provider*  
*Nominated for Best Family Office Service Provider-Client Services*

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## SPEAKING ENGAGEMENTS

2016

### Private Risk Management Association

*Lifestyle Risk of High Net Worth families: Educator Series*

2015

### Private Risk Management Association

*Annual Event, Atlanta, GA*

### Morgan Stanley

*Sports and Entertainment Event, Miami, FL*

2014

### Family Wealth Partner's Meeting

*Four Seasons, Scottsdale, AZ*

2011

### Private Asset Management Awards

*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*



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## SCOPE OF SERVICES

**The average affluent household employs both household and property staff, plus a wide range of subcontractors and vendors.** However, few are managed with the experience that is needed to control turnover, expenses and risk. Teresa Leigh Household Risk Management provides a comprehensive scope of services to support high-net-worth families; to bring peace of mind, order and structure to the management of their property and staff.

The services below are delivered according to client need



### Client Advisory

- Personal Consultations
- Work Life Balance/Quality of Life
- Reputation Risk Counsel
- Immediate Problem Resolution
- Protection of Confidentiality
- Audit/Evaluation of Household
- Identification of Areas of Concern
- Creation of Peace & Harmony in Home



### Human Resource Advisory & Management

- State/Federal Labor Law Compliance
- Salary & Benefit Trends
- Wage Disputes & Settlements
- Employee HR Onboarding
- Payroll Support
- Author Human Resources Policies and Directives
- Management of Time Sheets & Schedule



### Home & Property

- Evaluation of Operational Expenses
- Overview of Operational Systems
- Hiring Best-in-Class Subs/Vendors
- Mediation & Conflict Resolution
- Risk Assessment of Subs/Vendor
- Multiple Properties & Residences
- Management of Household Financial Risk
- Create System of Checks & Balances



### Staffing & Employee Management

- Best-in-Class Hires
- Performance Evaluations & Management
- Employee Mediation & Counseling
- Pre-employment Screening
- Background Investigations
- Skill & Personality Testing
- New Employee Integration & Support
- On-the-Job Training
- Confidentiality of client protected during vetting and screening of candidates

### DID YOU KNOW

During the lifespan of an affluent household, the average number of subcontractors and vendors hired is in excess of 160.

Between 2011 and 2014, New York, California and Hawaii have passed Domestic Workers Bill of Rights legislation, to include, but not limited to: Established wage protections, overtime, rest breaks and protection from abuse and harassment. Specific laws may vary from state to state.

In 2013, Oregon's house of representatives passed HB 2672 which provides overtime protections and guaranteed sleep for nannies and housekeepers.

The employer is responsible for documenting and archiving employment records for each employee, and may be required to produce substantiated documents upon audit.

Teresa Leigh Household Risk Management serves clients nationwide

Please call or visit the website for more information.