



teresa leigh

household risk management

TALKING POINTS

Clients and their families are seeking best practices and advice when hiring and managing domestics for in-home elder care. Help connect them to an expert resource.

1. Employment screenings, background checks, and background investigations (known as EBI's) should not be used as primary sources for vetting candidates for employment.
2. Job titles for in-home elder care include sitter, companion, caregiver, nurse's aide, CNA (Certified Nurses Assistant), LPN and RN.
3. A CNA's level of educational requirements varies greatly from state to state.
4. Five factors adversely affecting safe hires of domestics in 2019: culture, demographics, unemployment rate, visa restrictions, and the decreasing number of candidates who can pass a Work-Life Profile review.
5. There are over 3007 counties in the U.S., plus an additional 64 parishes in Louisiana, 16 boroughs in Alaska and 42 independent cities and the District of Columbia.
6. Candidates with problematic work histories or mental disorders are drawn to in-home employment due to the isolation and inadequate vetting.

Domestic Employee Risks and Solutions

1. Employers are at a higher risk of fraud and other violent crimes when using only EBI vetting procedures. As a general rule EBI's are less than 50% accurate. ***Solution: Use a combination of resources, most importantly include a Work Life Profile when vetting candidates for employment.***
2. Employees who are in transition with their aging employers may be at higher risk for on the job injury; e.g., lifting or physical care for their employers. ***Solution: Create ways for on-the-job training ensuring employees are properly trained and accept the new responsibilities.***
3. Those employers that continue to pay their employees with cash or personal checks risk labor law and tax violations. ***Solution: Placing employees on payroll benefits both parties. With payroll documentation employees can acquire credit for car loans, better housing, and ultimately an improved quality of life. Employers can track wages, benefits and lower risk.***

Founded in 2005 by Teresa Leigh, a celebrated author and speaker with over 30 years of experience.

Teresa Leigh Household Risk Management (TLHRM) is an award-winning, nationally recognized boutique firm specializing in the hiring and management of household and property staff for affluent individuals and families nationwide.

AWARDS & NOMINATIONS

2018

**Family Wealth Alliance
Best in the Industry Award**

*Winner, Best Outsource Solution Provider
Nominated for Security and Risk Provider*

2017

**Private Asset Management
Award**

Winner, Best Lifestyle Firm for HNW Clients

2016

**Private Asset Management
Award**

Nominated for Best Lifestyle Firm for HNW Clients

2015

**Private Asset Management
Award**

Winner, Best Lifestyle Firm for HNW Clients

Family Office Review Award

Nominated for Family Office Specialty Services



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COMPANY PROFILE

Teresa Leigh Household Risk Management (TLHRM) is an award-winning, nationally recognized boutique firm specializing in the hiring and management of household and property staff for High Net Worth individuals and families.

TLHRM expertly counsels clients and their advisors on new hires, the unique culture of domestics, Labor Law compliance, Human Resource management, and compensation and benefit trends. Through the art of effective communication and the science of risk management, TLHRM can quickly resolve staffing concerns.

Founded in 2005 by Teresa Leigh, a celebrated author and speaker with over 30 years of experience, TLHRM serves clients nationwide. Winner of the 2018 Best in the Industry Award for Outstanding Outsource Service Provider presented by Family Wealth Alliance. Winner of the 2015 and 2017 Best Lifestyle Firm for High Net Worth Clients Presented by Private Asset Management.

DEPTH OF FIELD

TLHRM is the only firm that offers clients both Best-in-Class candidates with the expertise of a professional Human Resources compliance 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. Ethonomics measures the level of skill and personality of candidates that corresponds to the unique requirements of the position.

ADVISORY

TLHRM's expertise is available to both clients and advisors. The firm offers the service option of a personal meeting at a clients' residence or a consultation by phone.

Advisors can offer clients a valued added service by connecting them to a subject matter expert who will provide them understanding and insight to their concerns. TLHRM is devoted to guiding and nurturing clients every step of the way to ensure long-term employees and to help create a peaceful and stress-free household.

AT A GLANCE

We provide clients the expertise to solve household and property-related problems, and our services enhance our clients' quality of life.

Years of Experience 30

Success Rate 98%

Provides client services nationwide

Offices in Raleigh, NC, New York, NY, & Palo Alto, CA

QUICK SERVICE LIST

Client Advisory and Support
Counsel to Advisors
Education Presentations on Industry Trends, Risks and Issues Facing Households
Employing Staff

New Hires
Resume Review
Labor Law Compliance
Background Investigations
Salary and Benefit Options

Human Resource Policies
Employee Counsel for Performance or Attendance Issues
iPhones and Social Media Guidelines

Resolving Communication Issues
Settlement on Wage or Benefits
Mediation of Disputes
Exits or Terminations



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SCOPE OF SERVICES

Many affluent households employ 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 individuals, families, and their advisors regarding the complexity of managing households and properties.

The services below are delivered according to client needs.



Client Advisory

- Discovery
- Problematic Staffing Concerns
- Immediate Problem Resolution
- Hiring Trends
- Understanding Staff Culture
- Creating Boundaries
- Interview Strategies
- Effective Communication



Human Resource Advisory

- Job Descriptions
- Human Resource Guidelines
- Labor Law Compliance
- Salary & Benefit Trends
- Wage Disputes & Settlements
- Employee Orientation
- Human Resource Policies & Directives
- Performance Evaluations



Home & Property

- Evaluation of Operational Expenses
- Social Media Risks
- Securing Confidential Information
- Hiring Best-in-Class Subcontractors & Vendors
- Mediation & Conflict Resolution
- Risk Assessment of Subcontractors & Vendors



Household and Property Staff

- Pre-Employment Screening
- Skill & Personality Testing
- Best-in-Class Hires
- Background Investigations
- Communicating Requests & Changes
- Employee Counseling & Mediation
- Cell Phone Policies
- Employee Transition
- Employee Retirement

DO YOU KNOW?

1. What is the number of different types of job titles for household and property staff?
2. What is the trending job title for the last two quarters of 2018?
3. How many different job titles for Personal Assistants are there?
4. Can a potential employer ask candidates what they earned on their last job?
5. When should the I-9 Form be filled out in the hiring process?
6. Can Nannies be paid a yearly salary?
7. Are employers responsible for documenting hours worked by their employees?

1. 62 2. Elder care 3. 7
 4. No 5. Before the candidate starts work 6. No, Nannies are hourly employees. 7. Yes
 Employers are responsible for showing proof of employees' hours worked

Teresa Leigh Household Risk Management serves clients nationwide

Please call or visit the website for more information.



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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

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

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

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

Wall Street Journal

Security Risks Get Wealth Families' Attention

2013

Morgan Stanley

Maintaining Harmony at Home: Best Practices in Hiring and Retaining Household Staff (White Paper)

CNBC

*Domestic Workers Employment Rights
Interviewed by Mr. Robert Frank*

2012

Forbes

Secrets of the Help

New York Post

Welcome to Downtown Abby

CNBC

How Your Household Help Puts You at Risk

Atlantic Trust: The Advisor

*Teaching Your Family Financial Self-Defense
Household Management Exposure:
You are an Employer*

New York Times

Color the 1 Percent 99 Percent Conflicted

Worth

Expert Advice: Lifestyle

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Private Asset Management Awards

Winner, of Best Lifestyle Firm for HNW 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*

SPEAKING ENGAGEMENTS

2019

CIPC

*Connecting the High Risk of Employing Domestics and In-Home
Elder Care
Nashville TN*

2018

Family Wealth Alliance

*Safely Hire Outsourced Vendors for SFO's and High Net Worth Clients'
Atlanta, GA*

2016

Private Risk Management Association

*Lifestyle Risk of High Net Worth Families: Educator Series
New York, NY*

2015

Morgan Stanley

*Sports and Entertainment Event
Miami, FL*

2014

Family Wealth Partner's Meeting

Four Seasons, Scottsdale, AZ

2010

National Basketball Association (NBA)

Rookie Camp, New York, NY