

CIIR™ Investment Intelligence Brief

Independent Intelligence for Family Office Investment Committees

A unique vantage point. A different kind of intelligence.

For more than 15 years, Family Office Insights has observed thousands of investment opportunities and the recurring patterns that influence how sophisticated family office investors evaluate them.

Rather than relying on theory, surveys, or conventional market research, our perspective has been shaped through direct exposure to the investment evaluation process itself.

From thousands of investment opportunities came something more valuable than market research.

It became Investment Pattern Intelligence™.

Investment Pattern Intelligence™ represents the recurring characteristics, decision frameworks, evaluation patterns, and critical questions experienced family office investors apply when assessing private opportunities.

Those insights became the foundation of the CIIR™ methodology.

Originally developed to help companies and fund managers understand how institutional investors evaluate opportunities before capital outreach, the methodology can also support family office investment committees evaluating opportunities already under consideration.

THE CIIR™ INTELLIGENCE ENGINE

One Intelligence Engine. Two Perspectives.



POWERED BY INVESTMENT PATTERN INTELLIGENCE™

**CAPITAL
ADVISORY™**

Companies &
Fund Managers

*How will sophisticated
investors evaluate us?*

Helping organizations prepare for
institutional capital.

**INVESTMENT
INTELLIGENCE™**

Family Offices &
Investment Committees

*How should we evaluate this
opportunity?*

Helping investment committees
evaluate opportunities under
consideration.

Independent

Objective perspective that complements existing advisors.

Institutional

Evaluated through the lens of sophisticated family office investors.

Focused

Highlights what matters most to investment committee decision-making.

CIIR™ Investment Intelligence Brief

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A concise executive review designed to strengthen — not replace — the investment committee's evaluation process.

Inside the CIIR™ Investment Intelligence Brief

Five questions. One focused decision-support process.

Each section is designed to help family office principals and investment committees surface insights, questions, and diligence priorities that may strengthen the quality and confidence of investment decisions.

1

EXECUTIVE OPPORTUNITY ASSESSMENT

What is this opportunity really about?

A concise executive summary of the opportunity, investment thesis, and principal factors influencing the decision.

2

INSTITUTIONAL STRENGTHS & CONCERNS

What stands out — for better or worse?

An independent assessment of the characteristics that may strengthen or weaken the investment case from an institutional perspective.

3

INVESTMENT COMMITTEE QUESTIONS

What should we be asking before we decide?

A prioritized set of strategic questions designed to improve committee discussion before capital is committed.

4

DILIGENCE PRIORITIES

Where should we focus our time and resources?

Identification of areas that may warrant verification, clarification, or specialist review.

5

INDEPENDENT REVIEW DISCUSSION

What does this mean for our decision process?

A confidential discussion with Family Office Insights to review findings, answer questions, and assess how the analysis may support the committee's evaluation process.

THE CIIR™ FOUNDING FAMILY OFFICE PROGRAM

Participating family offices receive a complimentary CIIR™ Investment Intelligence Brief on a company, fund manager, or private investment opportunity they are actively evaluating. In return, we ask only for candid perspective on how this intelligence can best support committee decision-making.

To participate, reply directly or contact Family Office Insights at admin@familyofficeinsights.com

