



FAMILY OFFICE
INSIGHTS

CIIR™

EXECUTIVE BRIEF

INSTITUTIONAL CAPITAL INTELLIGENCE BEFORE CAPITAL OUTREACH

CAPITAL INTELLIGENCE
& INVESTOR READINESS

1 START IN THE RIGHT PLACE

Most capital raises begin with outreach before understanding who is truly likely to invest.

Not every opportunity belongs in front of every investor.

CIIR™ helps determine who is most likely to care—and why.

We begin with intelligence—not introductions.

2 APPLY. QUALIFY. THEN ADVANCE THROUGH THE RECOMMENDED PATHWAY.



1 APPLY

Submit your investor presentation.



2 EVALUATE

We assess the opportunity through the lens of sophisticated family office and institutional investors.



3 QUALIFY

The CIIR™ Capital Intelligence Executive Report™ serves as our qualification mechanism.

Does this opportunity warrant advancing?



4 ADVANCE

Qualified organizations may be invited by Family Office Insights to proceed.



5 RECOMMENDED PATHWAY

FOI recommends the engagement pathway we believe best aligns with the opportunity and its objectives.



*The Executive Report is not a product for sale.
It determines whether an opportunity qualifies to advance.*

3 IF YOU QUALIFY, FOI MAY RECOMMEND ONE OF THREE ENGAGEMENT PATHWAYS.

All pathways begin with the same principle:

We don't start by asking who you know.

We start by asking who is most likely to care—and why.



RECOMMENDED PATHWAY 1 INVESTOR INTELLIGENCE YOU EXECUTE

FOI applies its investor intelligence methodology to identify, score and prioritize prospective family office and institutional investors demonstrating the strongest potential alignment with your opportunity.

**You receive the intelligence.
Your team conducts the outreach.**

INVESTMENT: \$2,500



RECOMMENDED PATHWAY 2 INVESTOR INTELLIGENCE + OUTREACH FOI EXECUTES

FOI develops the investor intelligence and applies it through a structured outreach program to the prospective investors demonstrating the strongest potential alignment.

We identify who is most likely to care—and why, then execute a structured outreach program on your behalf.

INVESTMENT: \$5,000



RECOMMENDED PATHWAY 3 INVESTOR INTELLIGENCE + OUTREACH + INSTITUTIONAL INVESTOR PRESENTATION FOI EXECUTES + PRESENTS

Our premium engagement combines investor intelligence and structured outreach with the opportunity to present through the Family Office Insights institutional platform.

This pathway is intentionally capacity-limited and subject to presentation availability.

INVESTMENT: \$10,000

4 INTELLIGENCE BEFORE OUTREACH.

CIIR™ begins the capital formation process in a different place: understand first, then engage.



Understand the opportunity.



Determine whether it qualifies.



Identify who is most likely to care—and why.



Decide how the intelligence should be put to work.

- ✓ This does not replace relationships.
- ✓ This does not replace investor judgment.
- ✓ This does not guarantee investor interest or investment.

**Better investment intelligence
leads to better capital conversations.**

THE CIIR™ PROCESS AT A GLANCE

1

APPLY
Submit Your Opportunity

2

EVALUATE
Institutional Intelligence

3

QUALIFY
Executive Assessment

4

ADVANCE
Invited to Proceed

5

RECOMMENDED PATHWAY
FOI Recommends the Pathway
Best Aligned to Your Opportunity



FAMILY OFFICE
INSIGHTS

www.familyofficeinsights.com