

# REPORTING

**Transparency** and clarity.

## Reviews and Reports

### Quarterly in-person reviews that include:

- Progress to plan
- Detailed portfolio performance across asset classes
- Market overview, including deep dives on current themes

### Customized in-depth reviews for the services you receive:

- Planning
- Legal
- Tax
- Lifestyle

### Other reporting services include:

- Net worth statement
- Year-end tax reporting
- Customized reporting capabilities

## Portal Access

### Online access that gives you transparency and live dashboards:

- Independent 3rd party reporting, including account aggregation
- True Fiduciary® Portal, financial goal tracking
- True Fiduciary® Vault, online document storage

## Market Overview

### We dig deep so you don't have to:

- Insights on what Cresset is watching
- Market commentary
- Benchmark trends
- News and highlights through Barron's

[cressetcapital.com](http://cressetcapital.com)



CRESSET®

Cresset refers to Cresset Capital Management and all of its subsidiaries and affiliates. Cresset Asset Management, LLC provides investment advisory, family office, and other services to individuals, families, and institutional clients. Cresset Partners, LLC provides investment advisory services strictly to investment vehicles investing in private equity, real estate and other investment opportunities. Cresset Asset Management, LLC and Cresset Partners, LLC are SEC registered investment advisors.