

*The*  
Family Wealth  
*Alliance*

October 1, 2009

SPECIAL ANNOUNCEMENT:

The Family Wealth Alliance, led by Chief Executive Officer Thomas Livergood, is proud to bestow upon Aspiriant, The Alliance's inaugural **2009 Leadership Award for Innovation**.

ASPIRIANT, an independent wealth management firm, was created in January 2008 by the merger of San Francisco-based Kochis-Fitz and Los Angeles-based Quintile Wealth Management, two firms that are complementary in their strategic vision as well as their geographical locations. With nearly \$4 billion in assets under its management responsibility, ASPIRIANT is among the largest independent wealth management firms in the U.S., and the largest in California. The firm has a deeply talented management team at both its locations. The thoughtful manner in which they held their merger discussions, and the remarkable success and proven results since that time, have been nothing less than extraordinary. Firms contemplating mergers would do well to take many pages from the playbook of ASPIRIANT – an innovative and inspiring merger of two equals.

Sincere congratulations to Aspiriant for all their accomplishments!