



The Good Stewards Operating System

Four money moments · one steward · three tracks · one source of truth · a hundred-year loop · goodstewards.io

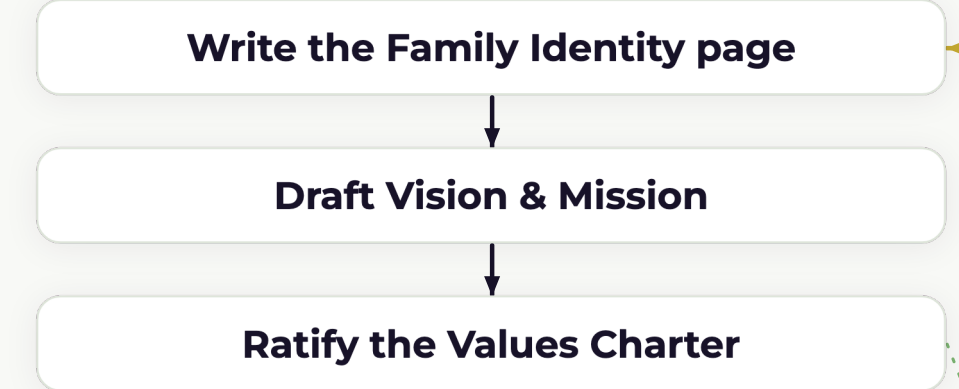
FOUR MONEY MOMENTS



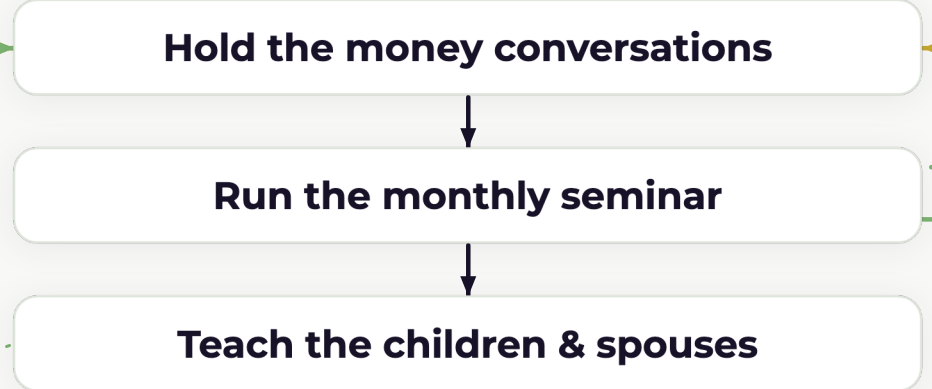
THE STEWARD

ONE PERSON DECIDES — THE FAMILY RUNS ON PURPOSE

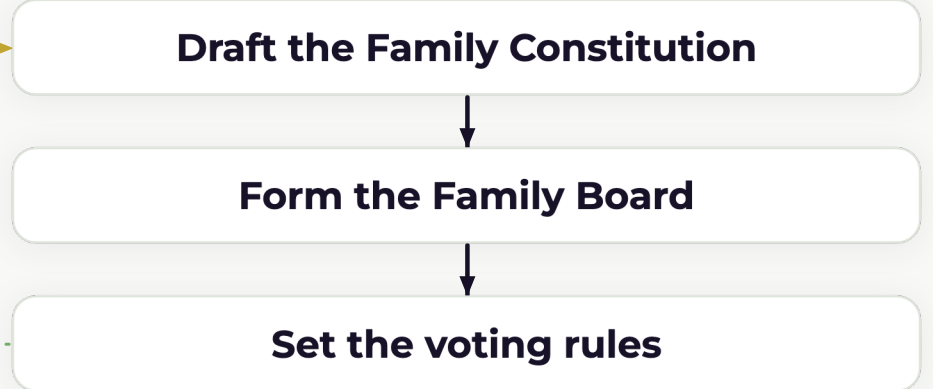
IDENTITY



CULTURE

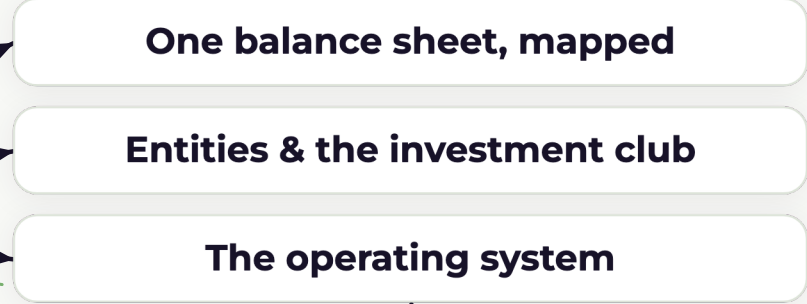


FAMILY LEADERSHIP



- PRESIDENT
- VICE PRESIDENT
- TREASURER
- SECRETARY
- INVESTMENT COMMITTEE

ORGANIZE



Family aligned?

YES

NO — KEEP TALKING

FAMILY INTELLIGENCE

ONE SOURCE OF TRUTH

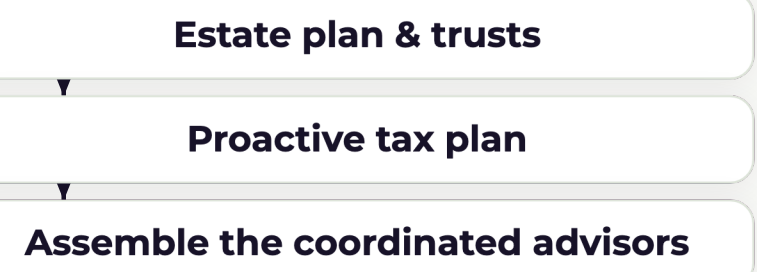
- PEOPLE
- ASSETS
- ENTITIES
- DOCUMENTS
- MEETINGS
- TAXES
- OWNERSHIP
- HISTORY

SAGE — The Family Intelligence Engine

CAPITAL ALLOCATION



PROTECT



One source of truth?

YES

NO — KEEP MAPPING

The Digital Family Vault

- TRUSTS
- INSURANCE
- TAX RETURNS
- FAMILY CONSTITUTION
- ESTATE PLAN
- MEETING MINUTES
- VIDEOS
- LEGACY LETTERS
- PHOTOS
- PASSWORDS
- ENTITY DOCUMENTS

Hold the Annual Family Summit

Seat the next generation

Family Traditions

Family Initiatives

A HUNDRED-YEAR FAMILY OFFICE — RUNNING

THE FAMILY FLYWHEEL



EXECUTION ENGINE

GOOD STEWARDS EXECUTES AT EVERY STAGE — ACCOUNTS OPENED · ENTITIES FILED · DOCS VAULTED · VOTES COMPLIANT · TAXES FILED · K-1S DELIVERED · SUMMIT PRODUCED · DASHBOARD TRACKED

- Family action
- A door in
- Checkpoint
- Legacy
- Milestone
- Loop
- Reinforcing
- Sage intelligence layer