

INTRODUCTION

Harris myCFO and Harris Private Bank professionals understand that the decision to make charitable donations can demand a great deal of time and resources. With that in mind, Harris myCFO and Harris Private Bank have created a donor-advised fund program under the auspices of the Harris myCFO Foundation, a public charity described in 501(c)(3), 509(a)(1) and 170(b)(1)(A)(vi) of the Internal Revenue Code of 1986, as amended. This Program Guideline outlines the Harris myCFO Foundation donor-advised fund program and the benefits, policies and procedures for establishing a donor account. These guidelines are the basis for the Foundation's activities and donor program and may be modified by the Foundation's Board of Directors at any time.

GIVING MADE EASY

Giving to the Harris myCFO Foundation allows you to establish a Donor-Advised Fund (DAF)—a flexible and efficient way to benefit charitable organizations important to you. By establishing a DAF, you can make a gift today for distribution of funds to a wide variety of charitable organizations and programs. Although the distributions may be spread out over a number of years, you receive a current charitable income tax deduction in the year the gift is made to the DAF. As the term “donor-advised” suggests, you may recommend which charities and organizations should benefit from your fund and how your fund assets should be invested—the final decision as to distributions and investments resides with the Board of Directors of the Foundation which has exclusive legal control over the assets contributed, the investment of the donated assets and their use for charitable purposes.

The DAF compares quite favorably to private foundations and supporting organizations. DAFs such as those established through the Fund, are characterized by:

- **Tax Effectiveness.** Because a donation to the Foundation to create a DAF is considered an outright gift, your gifts qualify for an immediate income-tax deduction up to the maximum allowed by law. Through DAFs, you avoid certain excise taxes to which private foundations are subject, which can significantly exceed the tax advantages of a private foundation.
- **Flexibility.** When you create a DAF, you may change your charitable recipient recommendations at any time. You or members of your family may also advise a fund's administrators on the timing, amount, and destination of gifts.
- **Simplicity.** Giving to a DAF saves you time, because you leave all administrative responsibilities to the fund's managers. You are exempt from the responsibilities of managing, reporting, and distributing the account's proceeds, which also saves you the additional costs associated with starting a private foundation.
- **Accountability.** Donors today are concerned that the resources dedicated to charitable causes are used effectively. The age of writing a check and trusting organizations to use the funds wisely has given way to an age of increased due diligence as well as a desire to assess the effectiveness of such funds in meeting the organization's goals and objectives. The Harris myCFO Foundation recognizes the need for increased accountability from the organizations receiving grants and therefore requires every organization receiving a grant in excess of \$20,000 to sign a grant agreement which at a minimum requires annual updates verifying compliance with any restrictions placed on the use of the funds as well as the impact such funds have made in meeting the organization's mission.
- **Foreign and Domestic Grant Distribution.** The Harris myCFO Foundation can broaden the scope of your charitable contributions by considering charities anywhere in the United States or any international organizations that are not government-affiliated, something that is most often not available through institutional and community foundation DAFs
- **Immediacy.** Even if you are unsure how you want to allocate your charitable contributions, you can create a DAF now and reap the tax benefits in the current calendar year. At a later date, you can provide your specific recommendations regarding charities, amounts, and timing of gifts.
- **Anonymity.** No other option for charitable giving enables complete anonymity on the part of the donor. Private foundations have more stringent public reporting requirements, making it nearly impossible for your gifts to remain anonymous. Donations from DAFs are structured so that you can maintain as much anonymity as you wish—you choose whether the recipient

of your gift learns your identity. This is especially useful when you wish to make a single gift to a charity but do not wish to pursue a continued relationship with the recipient.

- **Family Legacy.** Many of the intangible benefits of family giving sought in operating a family foundation can still be achieved through donor-advised fund giving. Family members can work together to determine which nonprofit organizations to support. Younger family members can be brought into the family philanthropy by allowing joint participation in the recommendation of grants. Working together, family members can still make site visits, review investment reports, analyze charitable proposals and serve as successor Advisors thereby learning from and perpetuating the family's involvement in the charitable giving process.

ELIGIBLE DONORS, ACCOUNT ADVISORS AND CONTRIBUTIONS

Donors and Account Advisors

Gifts from individuals, trusts, estates, charitable remainder trusts, charitable lead trusts, corporations and other entities for the Program will be accepted by the Foundation to establish a donor-advised fund account. Each donor has the authority to make contributions to the account, designate current and successor advisors, recommend grants to qualified charities, and request the reallocation of account funds to a specific investment pool. Each account may have up to two advisors to the account (“Advisors”). If a donor or his or her spouse name themselves as Advisors to an account, each will have the authority to make grant recommendations and to request the reallocation of account funds to a specific investment pool without the joinder of the other spouse.

Successor Advisors

When an account is established, the donor to the account may select any person or persons (including the donor and the donor's spouse), to assume the privileges and responsibilities associated with the Program upon the death or incapacity of all of the donors on the account (“Successor Advisor”). Written notification and verification of the death or incapacity of all of the donors to the account is required prior to becoming a Successor Advisor to the account. Successor Advisors can be granted full privileges regarding grant recommendations and investment pool designation or the Successor Advisors may be granted limited privileges at the discretion of the donor. The Foundation will recognize recommendations from any single Successor Advisor unless otherwise specified in the Gift Agreement.

Charitable Beneficiary

If the donor fails to designate Successor Advisors but has recommended a qualified charitable recipient or recipients for the account funds at the death of all of the original donors, the remaining account balance will be distributed to the recommended qualified charitable recipient or recipients subject to final approval by the Foundation Board of Directors. If the donor fails to designate Successor Advisors and recommend a qualified charitable recipient or recipients for the account funds at the death of all of the original donors, the remaining account balance will be distributed to the general fund for the Foundation.

Contributions

Assets acceptable for contributions through the Program include cash, publicly traded stocks, bonds and other securities, mutual funds, and certain restricted stock Gifts of real estate, artworks, closely-held stock, limited liability company or partnership interests, may be accepted subject to approval by the Foundation Board. Contributions of assets other than cash will be sold at the earliest date possible. Notwithstanding the foregoing, final acceptance of any contribution is in the sole discretion of the Board of Directors of the Foundation.

ESTABLISHING AN ACCOUNT

Sign Gift Agreement and Transfer Assets

To open an account, you must sign a Gift Agreement (“Agreement”). The Agreement provides information about you, the assets to be contributed, the name or names of the Advisors for the account, Successor Advisors to the account or recommended charitable recipients for the remaining account funds at your death. Gifting of stock certificates, stocks in street name, real estate, etc., will require specific terms of delivery to assure deductibility. These requirements and the timing of a gift become especially important at year-end if a deduction is desired for the year just ending. To make gifts of securities or

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other in-kind assets, you will need to complete a Transfer of Assets Form. **All donors are encouraged to consult with their tax advisors regarding the tax ramifications of his or her gift to the Foundation. The Foundation is not responsible for and does not render any tax or legal advice regarding deductibility of assets contributed to the Foundation.**

To make additional contributions to your account, you must complete an Additional Gift Form for each subsequent gift. Changes to account information require the completion of an Account Information Update Form.

Please contact the Foundation for more information regarding how to make contributions to the Harris myCFO Foundation DAF program. Charitable contributions to the Foundation are irrevocable; they cannot be refunded. All contributions are reviewed and approved by the Executive Director and/or the Board of the Foundation. Contributions that cannot be accepted will be returned promptly after review. Please consult with your own tax advisor regarding your particular situation before contributing to the Fund.

Account Minimums

In order to open a DAF account at the Foundation your contribution must have a value of at least \$10,000. Subsequent contributions to the Foundation can be as little as \$5,000 or as generous as you desire. All DAF accounts must maintain a minimum account balance of \$2,500.

Account Activity

If an account is opened and no funds are contributed within 60 days after set-up, the account will automatically be closed.

INVESTMENT OF CONTRIBUTIONS

At the time an account is established, the donor to the account may recommend that such gift be allocated to a specific investment pool. Failure to recommend a specific pool for investment will result in such gift being placed in the Highly Conservative pool. Cash contributions can be allocated immediately to the investment pool recommended by the donor. For contributions of assets other than cash, the Foundation will seek to sell such assets promptly and invest the net sales proceeds in the approved investment pool.

At the time a donor's contribution is allocated to the investment pool, the Foundation will allocate units to the donor's account. The value of the donor's recommended investment pool will be determined at the end of each business day based on the prices of the underlying mutual fund shares. This value will include any realized and unrealized gains and losses on the portfolio of investments, as well as undistributed net investment income (income earned on the underlying mutual funds' portfolio securities, less expenses charged to the mutual funds) attributable to the pool, if any. At the end of each business day, a unit value will be calculated for each pool based on its aggregate value, after expenses, divided by the number of units outstanding. The value of each donor's account will be the number of units of the pool assigned to that account multiplied by the current unit value for that pool.

Investment Pools

The Foundation invests contributions in investment pools composed primarily of various mutual funds that the Foundation Board of Directors has selected as appropriate investment choices for the Program. The Program investment options are designed to reflect the risk and reward philosophy of its donors. Each donor may recommend that his or her gifted funds be managed in one of the pools below. Final investment decisions rest solely with the Foundation's Board of Directors. In identifying a pool, the donor should consider his or her charitable giving objectives:

- If the goal for the donor is to be able to recommend to the Foundation that grants be made immediately or over a short period of time, a pool weighted toward fixed income may be more appropriate in order to provide liquidity for such grant making goals.
- If the donor anticipates recommending fewer or smaller grants over the short term with the goal of building appreciation for future grant making, a pool weighted toward equities may be more appropriate.

Capital Growth.....	70% equity / 30% fixed income
Moderate.....	40% equity / 60% fixed income
Income.....	25% equity / 75% fixed income
Highly Conservative.....	0% equity / 100% fixed income

Failure to select a pool will result in a donor's contribution being invested in the Highly Conservative Pool. The allocations shown here are targets and are subject to modification from time to time.

Fund Investments

The investments selected for the Harris myCFO Foundation DAF program are:

Large Cap US Equity	Vanguard 500 Index Vanguard Value Index
Mid/Small Cap US Equity	Schwab Small Cap Index Select DFA US Small Cap Value
International Equity	American Funds EuroPacific Growth DFA International DFA International Small Cap DFA Emerging Markets
Fixed Income	PIMCO Real Return Fund PIMCO Low Duration Fund
Money Market	Schwab Value Advantage Money Fund

The investment pools are not investment entities or mutual funds themselves and are not available for investment outside the Harris myCFO Foundation. There are no prospectuses for the pools, but each pool attempts to achieve its investment objectives referenced above and more specifically described below. Market fluctuations will cause the value of assets invested in an account pool to be worth more or less than the value of the original contribution.

Harris myCFO Investment Advisory Services LLC provides investment advisory services to the Funds and receives fees for such services. **Not FDIC Insured—May Lose Value—No Guarantee.**

Investment Objectives of Pools

Capital growth pool – 70% equity/30% fixed income. The primary objective of the Capital Growth pool is above-average capital appreciation, rather than current income generation. There may be substantial fluctuations in portfolio values. A relatively high tolerance for risk and a longer time horizon characterize this investment style. To meet this objective, the pool is currently invested in DFA US Small Cap Value Portfolio (2.3%), Schwab Small Cap Index Select (9.0%), Vanguard Value Index Fund (9.0%), Vanguard 500 Index Fund (35.8%), EuroPac Growth (5.0%), DFA International (5.0%), DFA International Small Cap (1.1%), DFA Emerging Markets (2.80%), PIMCO Low Duration Fund (14.8%), PIMCO Real Return Fund (10.3%), Schwab Value Advantage Money Fund (4.9%).

Moderate pool – 40% equity/60% fixed income. The main objective of the Moderate pool is to achieve modest capital appreciation and income from the portfolio. While this range of risk is designed to preserve capital, fluctuations in the values of the portfolio may still occur from year to year. A slightly higher risk tolerance than the most conservative donor and an intermediate time horizon characterize this investment style. To meet this objective, the pool is currently invested in Vanguard 500 Index Fund (20.5%), Vanguard Value Index Fund (5.2%), DFA US Small Cap Value Portfolio (1.3%), Schwab Small Cap Index Select (5.1%), EuroPac Growth Fund (2.9%), DFA International (2.9%), DFA International Small Cap (0.6%), DFA Emerging Markets (1.60%), PIMCO Low Duration Fund (30.00%), PIMCO Real Return Fund (21.00%), Schwab Value Advantage Money Fund (9.0%).

Income pool – 25% equity/75% fixed income. The main objective of the Conservative pool is to preserve capital while providing income. Low risk tolerance and/or a short to intermediate time horizon, as well as a desire for investment stability and liquidity, characterize this investment style. To meet this objective, the pool is currently invested in Vanguard 500 Index Fund (12.8%), Vanguard Value Index Fund (3.2%), DFA US Small Cap Value Portfolio (0.8%), Schwab Small Cap Index Select (3.3%), EuroPac Growth Fund (1.85%), DFA International (1.85%), DFA International Small Cap (0.4%), DFA Emerging Markets (1.0%), PIMCO Low Duration Fund (37.1%), PIMCO Real Return Fund (26.3%), Schwab Value Advantage Money Fund (11.4%).

Highly conservative pool – 0% equity/100% fixed income. The main objective of the Highly Conservative pool is to preserve capital while providing income. Designed with the cautious investor in mind, the pool seeks safety of principal by investing in a diversified portfolio of fixed-income investments. A low risk tolerance and/or a short time horizon, as well as a desire for investment stability and liquidity, characterize this investment style. To meet this objective, the pool is currently invested in PIMCO Low Duration Fund (20.0%), PIMCO Real Return Fund (20.3%), Schwab Value Advantage Money Fund (59.7 %).

There is no assurance or guarantee that any pool (or any underlying mutual fund) will achieve its stated objective.

Frequency in Recommending a Change in Investment Pool

Advisors for the Program accounts may recommend, in writing, that the assets of such account be invested in a different investment pool once a quarter. Once a recommendation is approved, the Foundation will reinvest the donor's account at the end of the quarter in which such recommendation is made. The Foundation will consider such recommendation but the final decision as to whether or not to invest such assets in another investment pool is in the sole discretion of the Board of the Directors of the Foundation.

GRANTMAKING

Grant Minimums and Restrictions

The minimum amount that will be considered for distribution by the Foundation board is \$250. The Advisors may make recommendations regarding the timing and amount of gifts and the charitable organizations that will receive them. Grants will be made to tax-exempt, nonprofit, public charities as defined and qualified under Sections 501(c)(3) and 509(a)(1) and (2) as well as certain 509 (a)(3) organizations of the Internal Revenue Code. The Foundation will consider recommendations for gifts to public charities anywhere in the United States and to international, nongovernmental organizations. However, any grant recommendation for gifts to foreign charitable organizations will be subject to an additional fee to support the research required to ensure the tax-deductibility of such a donation, and to properly oversee the use of such funds.

Grants may not be made to honor existing pledges and may not be made directly to individuals under any circumstances. No distributions will be made to any private foundation. Proposed grants must be equal to or less than the balance in the donor's account. Grant recommendations that exceed the donor's account balance will not be processed and the advisor to the account will be notified. Grants cannot be made for lobbying purposes or to support political campaigns. **Grant recommendations made to pay for tickets to benefit dinners, or for memberships, charitable auction items, school tuition, or grants for any other benefit for a specific individual will not be processed.** Such benefits are impermissible under the IRS regulations. The IRS requirements and the Foundation's policy forbidding "quid pro quo" grants is designed to assure that the dollars given are utilized solely for charitable purposes.

Grantee Eligibility

The Foundation will determine the eligibility of the charitable grantee and perform appropriate due diligence to assure that the recommended grant meets IRS guidelines and the Foundation's policies. If it is determined that a grant made by the Foundation does not meet the IRS guidelines and/or the Foundation's policies, the Foundation reserves the right to take any and all appropriate action to ensure that the funds are utilized solely for charitable purposes and that no impermissible private benefit has been received by any individual.

Review and Timing of Grants

Grant recommendations are reviewed and processed at least weekly. Following review of the recommended grant recipient's eligibility by the Foundation staff, the Board of Directors of the Foundation reviews the grant recommendations. The Foundation's Board of Directors has exclusive legal control over the assets contributed, the investment of such assets and the charitable use of such assets. Following such review, the Board of Directors shall approve or disapprove the grant recommendations. In the event a grant is not approved, the Advisor to the account will be notified regarding the reasons for such disapproval.

Once the Foundation approves a grant recommendation, the grant is made as soon as possible. Advisors should allow for 10 to 14 business days between the time of submission of a grant request and the mailing of the check to a charitable recipient.

Grant Notification and Acknowledgment

When a grant has been approved, the Foundation will redeem units from the program account and send the proceeds by check to the approved charitable organization. The letter accompanying the grant check will come from the Foundation and can acknowledge the Advisor who recommended the grant, the name of the account, can be made in memory of or in honor of another individual or can be made anonymously as the Advisor so designates. The Advisor to the account will receive a copy of the acknowledgment letter at the time the check is sent to the charitable organization.

Grant Agreements for Grants in Excess of \$20,000

For grants in excess of \$20,000, each charitable recipient will be required to sign a grant agreement which at a minimum requires the charitable recipient to verify that the grant will be used solely for charitable purposes and will provide the Foundation with a report (to be filed annually) as to the use of the grant funds until such funds are fully expended.

Five Percent (5%) Minimum

The Foundation expects to distribute a minimum of 5% of the net fair market value of the Foundation's aggregate assets held within all the program's donor-advised accounts on a rolling 5-year fiscal basis. Each Advisor is encouraged to recommend distributions of a minimum of 5% of their account annually. If the level of aggregate distributions falls below the 5% minimum over such period, the Foundation will identify and notify the Advisors of accounts which have not made total grants over the same five-year period of 5% and request that such Advisors make grant recommendations of at least 5%. Advisors of such accounts will then have 60 days in which to make such grant recommendations. In the event such Advisors do not respond within such 60day period, the Foundation has the right to distribute up to 5% of the assets from such account to the Program's General Fund for grantmaking.

FEES AND EXPENSES

The contributions of donors to the Program accounts are combined in investment pools for cost efficiency, but the contributions, investments results and grants for each account are tracked separately and reports are provided on an individual account basis.

The Foundation has entered into Service Agreements with Harris myCFO Investment Advisory LLC, and Harris myCFO, Inc., to provide investment advice, and administrative and recordkeeping services. Investment and administrative expenses are charged to each program account based on the following policies which policies may be changed by the Foundation's Board of Directors at any time.

Administration Fees

The Foundation incurs administrative expenses to carry out its operations as a charitable organization. Such expenses include but are not limited to, general operating expenses such as legal and accounting fees, vendor and service provider fees, fund-raising expenses and other expenses necessary to the proper administration of the program. The Foundation also incurs expenses with its Investment Advisor, Harris myCFO Investment Advisory Services LLC which monitors the pools' asset allocation and the managers of the funds comprising the pools, liquidates marketable securities contributed to the Foundation, executes the trades for the pools and provides performance reporting for the Foundation. To cover the foregoing costs, the following administrative fee schedule will be charged to each program account at the end of each month based on the average daily balance for the month. Such fees will be directed to the Program's General Fund. **A minimum fee is applied to each account based on the minimum required account balance of \$2,500.**

Month-end account value	Annualized administrative fee
\$10,000 – \$1,000,000	1.00%
Next \$1,000,001 – \$5,000,000	0.94%
Next \$5,000,001 – \$10,000,000	0.87%
Over \$10,000,000	0.82%

Investment Expenses

Each investment pool invests in mutual funds that bear their own respective management, servicing and operating expenses that are reflected in each fund's and the pool's daily net asset value. Because such fees are charged at the mutual fund level, these expenses are not charged directly at the program account level. The estimated composite expense ratio of each investment pool is shown in the table below, based on third-party sources we deem reliable as of October 18, 2006, subject to change periodically:

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Investment Pool	Approximate Pool Composition	Fund Expense Ratio	Estimated Composite Pool Expense Ratio	
Capital growth pool	35.8%	Vanguard 500 Index Fund	0.18%	0.35%
	9.0%	Vanguard Value Index Fund	0.21%	
	9.0%	Schwab Small Cap Index Select	0.41%	
	2.3%	DFA US Small Cap Value	0.55%	
	5.0%	American Funds EuroPac Growth	0.80%	
	5.0%	DFA International	0.30%	
	1.1%	DFA International Small Cap	0.64%	
	2.8%	DFA Emerging Markets	0.69%	
	14.8%	PIMCO Low Duration Fund	0.43%	
	10.3%	PIMCO Real Return Fund	0.45%	
	4.9%	Schwab Value Advantage Money Fund	0.45%	
Moderate pool	20.5%	Vanguard 500 Index Fund	0.18%	0.39%
	5.2%	Vanguard Value Index Fund	0.21%	
	5.1%	Schwab Small Cap Index Select	0.41%	
	1.3%	DFA US Small Cap Value	0.55%	
	2.9%	American Funds EuroPac Growth	0.80%	
	2.9%	DFA International	0.30%	
	0.6%	DFA International Small Cap	0.64%	
	1.6%	DFA Emerging Markets	0.69%	
	30.0%	PIMCO Low Duration Fund	0.43%	
	21.0%	PIMCO Real Return Fund	0.45%	
9.0%	Schwab Value Advantage Money Fund	0.45%		
Income pool	12.8%	Vanguard 500 Index Fund	0.18%	0.41%
	3.2%	Vanguard Value Index Fund	0.21%	
	3.3%	Schwab Small Cap Index Select	0.41%	
	0.8%	DFA US Small Cap Value	0.55%	
	1.85%	American Funds EuroPac Growth	0.80%	
	1.85%	DFA International	0.30%	
	0.4%	DFA International Small Cap	0.64%	
	1.0%	DFA Emerging Markets	0.69%	
	37.1%	PIMCO Low Duration Fund	0.43%	
	26.3%	PIMCO Real Return Fund	0.45%	
	11.4%	Schwab Value Advantage Money Fund	0.45%	
Highly conservative pool	20.0%	PIMCO Low Duration Fund	0.43%	0.45%
	20.3%	PIMCO Real Return Fund	0.45%	
	59.7%	Schwab Value Advantage Money Fund	0.45%	

Short-term Account Fee

If an account has grants of more than 90% of the value of the account distributed within 12 months of establishing an account, the Foundation will charge a one-time fee of 2% on the maximum balance in the account during the 12-month period, such fee not to exceed \$10,000.

Foreign Grants and Unusual Fees

From time to time, donors wish to recommend grants to non-US based charities. Because of the due diligence requirements that must be undertaken to ensure the eligibility of such perspective grantee as a charitable organization which would qualify for status as a nonprofit if based in the United States, additional fees will be charged for such time and expense necessary to perform such due diligence process. Internal Revenue Service regulations also require ongoing monitoring and reporting of the use of such funds until fully expended by the non-US based charity necessitating the charge of additional fees for such oversight. Such fees will be determined at the time of the consideration of such grant and disclosed to the Advisor of the account making such recommendation. Gifts of assets other than cash or marketable securities will carry a negotiated fee.

RECORDKEEPING AND REPORTING

Confirmation of Contributions

The Foundation will provide a letter confirming the receipt and approval of a contribution to the Foundation. Such letter will provide the date of the contribution and a description of the asset transferred. The confirmation letter is designed to fulfill the Internal Revenue Service's requirement for substantiation of the contribution and should be maintained as part of the donor's tax records. As a courtesy to donors, the confirmation letter will reflect the Foundation's good faith estimate of the fair market value of securities as of the date of gift. Donors making contributions of assets other than cash or publicly traded securities are responsible for obtaining their own appraisal of value as required by law and, nothing herein should be construed to mean that the donor may rely on any estimate of value provided by the Foundation for purposes of the donor's tax deduction. **The Foundation is not**

responsible for and does not render any tax or legal advice regarding the value or deductibility of assets contributed to the Foundation.

Account Statement

The Foundation will provide quarterly statements that summarize contributions, grants and investment pool activity for each program account.

Access to Reports and Documents Through the Web

The Gift Agreement, Letter of Authorization, Grant Recommendation form, Additional Gift form, Account Update forms are available as PDF files on the Harris myCFO Foundation website at harrismycfofoundation.org. The website also provides links which allow donors and Advisors to check account balances, submit grant recommendations online and download forms. The Foundation prizes the privacy of its donors and to ensure such privacy, the website uses 128-bit encryption and Secure Sockets Layer (SSL) version 3.0 protocol.

IMPORTANT CONTACT INFORMATION

For questions, please contact your Harris myCFO Client Director or contact the Foundation as provided below:

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