



Lifestyle Services

We are with you during life's unique moments, helping you live your best life.

Your wealth extends beyond portfolios and performance. Paired with the curation of lifestyle services and professionals, it can become the bearing for good health and sophisticated living—all while supporting your pursuit of meaning and joy.

As our client, you have access to a curated selection of third-party service providers in areas including travel, wellness, life transitions, enrichment, protection, luxury, and impact. These professionals have been handpicked and vetted by our Lifestyle Services team to provide quality solutions to help meet your needs. Many of these providers offer preferential services or pricing for our clients.

How It Works

- As a client of Focus Partners Wealth, you have access to a curated collection of third-party resources with exclusive pricing, offers, and preferred services.
- Please contact your advisor to unlock the benefits available to you as our valued client.
- We are continuously vetting new providers, so please ask about any service you might need, even if it's not listed in our brochure.

Our goal is to help you find and fulfill your purpose. Managing your wealth is just one piece of that.



Every part of your present and future should be enriched and explored.

We offer a distinct set of services designed to address your needs and aspirations, supporting you and your family throughout your life's journey.

TRAVEL

Lifestyle Services is your liaison to bespoke family vacations, authentic cultural travel, custom travel experiences, and global travel security services.

WELLNESS

Lifestyle Services partners can help you navigate complex areas of your health and well-being, including health care advisory, telemedicine services, and support for addressing health concerns at home or abroad. They also provide customized lifestyle, nutrition, and mental and physical wellness support.

LIFE TRANSITIONS

Lifestyle Services transition specialists offer support through life's impactful changes, including retirement coaching focused on new beginnings, personalized senior living consultations, and companion care and emotional support services.

ENRICHMENT

Lifestyle Services enrichment partners are here not just for you, but for every member of your family. From direct academic support and tutoring for students of all ages, to executive and leadership coaching for professionals, they help make sure you have all your bases covered.

PROTECTION

We collaborate with trusted experts across multiple areas of personal and digital protection, giving you access to a wide range of resources designed to help safeguard what matters most—your identity, your finances, and your peace of mind.

LUXURY

Lifestyle Services strives to make your life easier with a range of convenient services to support your lifestyle. These include private aviation and concierge services, wine collection management, fine art advisory, wardrobe storage, valet assistance, and more.

IMPACT

Lifestyle Services philanthropic advisors help ensure your charitable contributions align with the values you hold dear. They can assist in the setup and administration of private foundations, match you with vetted nonprofits that share your beliefs, help you navigate the governance and tax efficiency of your giving efforts, and so much more.

TRAVEL

Transform the way you experience the world.

Lifestyle Services premium travel partners specialize in designing bespoke, one-of-a-kind journeys that reflect your interests, values, and lifestyle. From multi-generational family adventures to secluded luxury escapes, every detail is crafted to exceed expectations and create lasting memories.

Services include:

- Fully customized travel itineraries for families, couples, solo travelers, and special occasions
- Culturally immersive experiences—private safaris, spiritual pilgrimages, culinary journeys, and heritage exploration
- Active and wellness-focused travel including hiking, cycling, and spa-focused getaways
- VIP concierge assistance for flights, visas, luxury accommodations, and airport services
- Access to exclusive properties, private tours, after-hours museum visits, and hidden gems not available to the general public
- Planning for milestone events abroad (e.g. anniversaries, destination weddings, retirement trips)



WELLNESS

Curated care for mind, body, and peace of mind.

Lifestyle Services wellness providers offer proactive, integrated support to help you and your loved ones live well, stay resilient, and thrive—no matter where life takes you. These services are especially valuable for families managing multi-generational wellness, chronic conditions, or global mobility.

Services include:

- Behavioral health concierge services with access to top-tier therapists, mental health crisis support, and coaching
- Personalized senior care navigation, including in-home care planning and long-term support strategies
- Global health care access, including cross-border medical coordination and telehealth services
- Second opinion services from leading medical institutions and specialists
- Lifestyle coaching that includes nutrition, movement, mindfulness, and sleep optimization
- Preventative wellness programming tailored for executives, caregivers, and aging individuals



LIFE TRANSITIONS

Expert guidance through life's most meaningful chapters.

Major life changes often bring emotional and logistical complexity. Lifestyle Services dedicated transition specialists offer insight, planning, and hands-on support—ensuring grace, dignity, and clarity at every step.

Services include:

- Personalized senior living consultations and in-home care planning with a focus on comfort and continuity
- Companion care and emotional support services to reduce isolation and promote well-being
- Retirement coaching focused on life purpose, social engagement, and new beginnings
- Relocation consulting and management—ideal for downsizing, moving closer to family, or aging internationally
- Virtual family meetings and consultations to align on care decisions and create unified plans
- Transitional coaching for divorce, widowhood, and unexpected life shifts



ENRICHMENT

Nurture lifelong learning and unlock personal growth.

Whether advancing in your career, preparing your children for academic success, or discovering new purpose in retirement, Lifestyle Services enrichment partners provide tailored support to help every member of your family grow with intention.

Services include:

- One-on-one academic support, tutoring, and standardized test prep for students at all levels
- Strategic college and graduate admissions consulting—from school selection to essay coaching
- Executive and leadership coaching for professionals pursuing performance and balance
- Retirement coaching services that go beyond finances to help redefine identity and purpose
- Life coaching and mentoring across transitions such as career pivots, parenthood, or empty-nesting



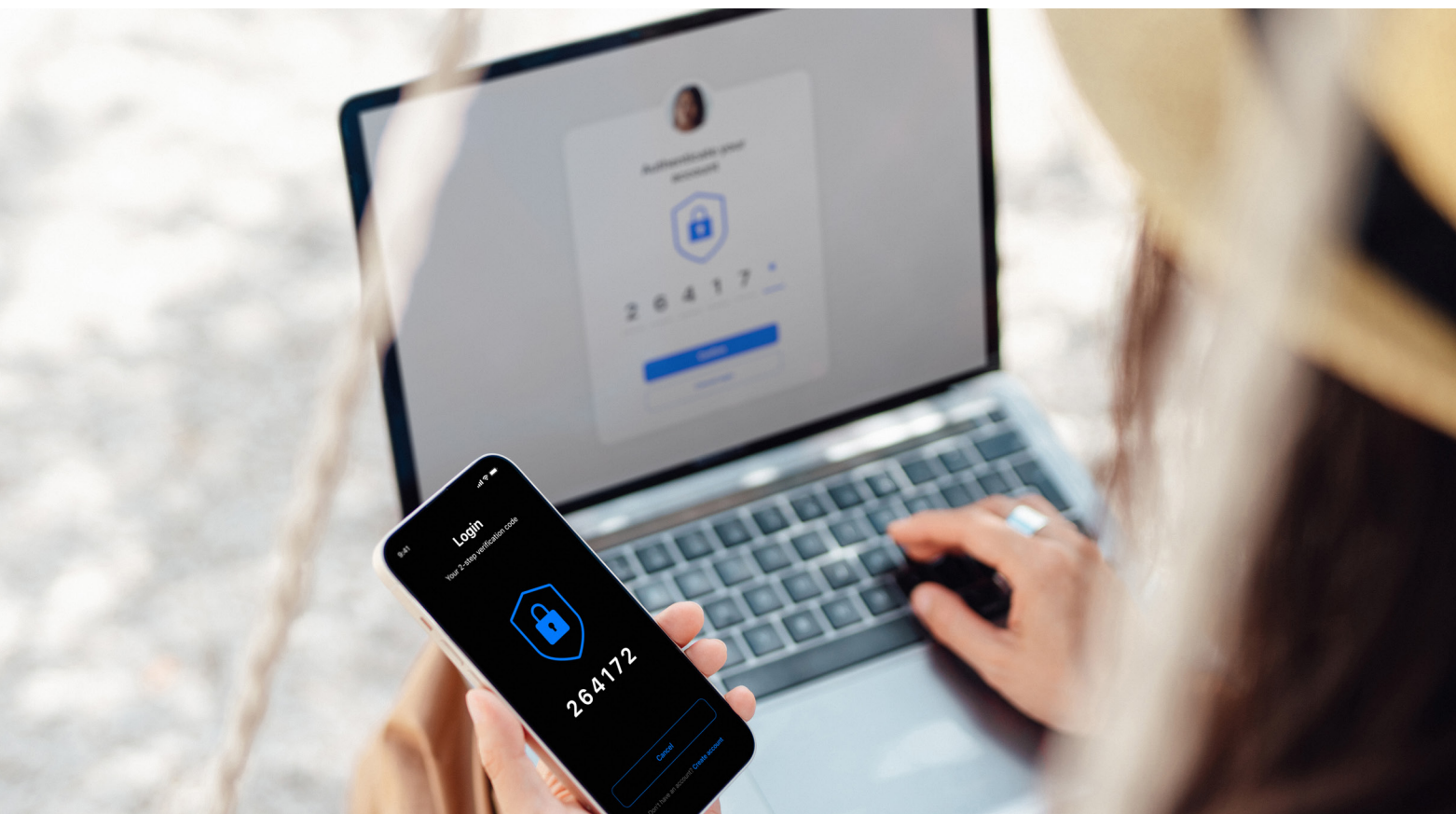
PROTECTION

Stay protected in a connected world.

Digital identity, financial reputation, and physical safety are among your most vital priorities. Lifestyle Services security providers bring together expertise in cybersecurity, protection, and physical security advisory—equipping you with the tools, insight, and response strategies needed to stay secure in today's ever-evolving threat landscape.

Services include:

- Enterprise-grade cybersecurity solutions adapted for personal use—across all devices and networks
- Identity theft prevention and monitoring, including online privacy audits and data minimization strategies
- Recovery and remediation services in the event of breach or fraud, with dedicated case management
- Credit monitoring, dispute resolution, and assistance with freezing or restoring credit files
- Guidance on digital legacy planning, social media hygiene, and online reputation management
- Comprehensive physical and digital security advisory services



LUXURY

Effortless elegance, curated for your lifestyle.

Live life beautifully and with ease. Lifestyle Services high-touch providers deliver discreet, luxurious services that support your refined taste, busy schedule, and personal priorities—allowing you to spend more time doing what you love.

Services include:

- Private aviation planning and advisory services
- Elite concierge services including restaurant reservations, private event access, luxury gifting, and hard-to-get experiences
- Wine cellar inventory, purchasing advice, and climate-controlled storage solutions
- Fine art advisory including valuation, acquisition, preservation, and collection management
- Bespoke wardrobe services including seasonal rotation, archival storage, and personal styling
- Family Office Services: Family Governance Support, Peer Group Curation, and Intergenerational Communication Coaching



IMPACT

Give with purpose. Lead with legacy.

From amplifying your charitable giving to building a family legacy of impact, Lifestyle Services philanthropic advisors bring clarity and structure to every phase of your journey—ensuring your contributions align with your values and achieve measurable outcomes.

Services include:

- Values-based matchmaking with vetted nonprofits and social impact ventures
- Private foundation setup, administration, and grant management
- Donor-advised fund guidance and ongoing strategy support
- Family legacy programs that engage younger generations in shared purpose
- Metrics-driven philanthropic planning to evaluate and refine giving impact
- Expert navigation of governance, tax efficiency, and compliance in charitable efforts

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Lifestyle Services is a thoughtfully selected collection of resources available to clients of Focus Partners Wealth. These resources are third-party providers designed to support you with your travel, wellness, security, learning, and lifestyle needs. Some Lifestyle providers offer preferential services or pricing to our clients; however, Focus Partners does not receive any additional fees for referring you to these providers, nor do we receive additional fees from them for their services to you. This communication was prepared using third party sources. Focus Partners considers these sources to be reliable; however, it cannot guarantee the accuracy or completeness of the information received.

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