

# HARRIS myCFO®

John Benevides is President of Harris myCFO, Inc. an integrated wealth management provider serving wealthy individuals and families across their tax, estate, investment, philanthropic, risk and family capital needs. A subsidiary of the Bank of Montreal, Harris myCFO® serves nearly 250 wealthy families across the US, overseeing more than \$19 billion in assets under advisement.

John provides vision as well as strategic and operational leadership in service to clients across the full suite of family office services. Bringing more than 20 years of financial services experience and insight, most recently as co-owner and president of Family Office Exchange, John helps ensure clients successfully navigate the often complex issues high wealth brings. He has helped Harris myCFO® become recognized for offering one of the country's most comprehensive suites of services tailored to this unique market.

Mr. Benevides is a featured speaker and presenter, and has been quoted in *Barron's*, *Financial Times*, *The Wall Street Journal*, *Australian Financial Review*, *Family Wealth Report*, *Private Wealth*, *Research*, and more.

John received his undergraduate degree in Psychology and Economics from the University of Maryland. He was the distinguished graduate in finance and economics at Johns Hopkins University where he earned an M.S. in Finance and an MBA.

John has advised c-suite executives for the world's leading financial institutions on-site in more than 40 countries and currently serves as the Chairman of the Executive Committee for the 1,700 member, Family Business Network, of the Young Presidents Organization (YPO/WPO).



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### Harris myCFO® | A Knowledge of Wealth™

Integrated wealth management with independent investment advisory services and the comprehensive capabilities of a multi-family office.

- INVESTMENT ADVISORY
- ESTATE AND TRUST ADVISORY
- TAX PLANNING
- PHILANTHROPIC PLANNING
- FAMILY EDUCATION
- CAPITAL ADVISORY SERVICES AND CUSTOM BANKING
- RISK MANAGEMENT AND INSURANCE ADVISORY
- FINANCIAL REPORTING AND EXPENSE MANAGEMENT

