

## Zan Sloan Principal

Harris myCFO, Inc.  
1080 Marsh Road, Suite 100  
Menlo Park, CA 94025  
Tel: 650.210.5101 • Fax: 650.210.5012  
zan.sloan@harrismycfo.com  
www.harrismycfo.com

Zan Sloan, Principal, specializes in Insurance Services and is responsible for the delivery of risk management services for affluent families, executives and closely held businesses. She specializes in working with third-party providers to offer clients the best solutions for their insurance needs. Ms. Sloan has over 13 years of professional experience, with expertise in the following areas of insurance coverage: personal property & casualty, commercial, employee benefits, aviation, equine, and marine.



Ms. Sloan earned her bachelor's degree from Mercy College in New York.

Ms. Sloan makes her home in Redwood City, where she is president of the board of directors for the Boardwalk Owners Association.

Harris myCFO is dedicated to simplifying the complex issues that face individuals and families of wealth by delivering the guidance and services of a Comprehensive Family Office.

We give you the flexibility to build a team of specialists, coordinated by Harris myCFO, that can include your own trusted advisors along with some of the best professional talent for the various aspects of your wealth management strategy.

Harris myCFO is the next step for affluent individuals and families who desire a comprehensive wealth management solution. One that is built upon objectivity, accountability and best-in-class solutions provided on a fee-only basis. It is also designed for existing family offices who may want access to outside talent and resources to expand their capabilities.

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