



# WELCOME TO TAPESTRY

Tapestry is a property and personal lifestyle consultancy for individuals and families of significant wealth and their trusted advisors.

Employing the strictest levels of discretion and confidentiality, Tapestry's services focus on luxury residential property operations and staffing; personal service delivery, special projects and complex event management.



# ENGAGING TAPESTRY - QUESTIONS WE ANSWER

## HOUSEHOLD & PROPERTY OPERATIONS ASSESSMENTS

How do we establish and document our property and service preferences and standard operating procedures?

How do we ensure our properties, equipment, collections, etc., are being properly maintained and exercised?

How can we better leverage our resources across our property portfolio to enhance efficiency, save costs and make our experience more predictable and enjoyable?

How can we best assure our physical asset(s) are properly controlled and documented?

What is required to ensure I have adequate disaster preparedness planning for my overseas or remote property?

How do we ensure we have a comprehensive medical and emergency evacuation plan?

Is it possible to have a thorough, effective security plan without compromising my privacy and comfort?

## STAFFING and PLACEMENT

When do we need a more formal organizational structure and what factors should we consider when deciding if staff should be direct hires or outsourced?

How can we improve retention? What strategies are we missing or should we consider?

What level of staffing is appropriate given the size of my property portfolio and what type of staff do I need?

We're not a corporation. How do I develop employee manuals/handbooks to reflect the unique requirements /nuance of private service?

What is the best recruiting and placement strategy? How do I know if the job description for which I'm hiring is accurate and what the compensation package should include?

How do I measure and incentivize performance?

What factors and practices should I consider if I want my staff to live on-site?

## OWNER REPRESENTATION/ SPECIAL PROJECTS

Can my in-house staff manage the project without impact to their normal role? Do they have the right subject-matter expertise?

What reporting controls will help ensure my project is on-time and budget and my expectations are met?

How do I evaluate my budget? My schedule?

What is a project risk assessment and does my project scope merit having one completed?

I'm hosting a critical business gathering with high-profile political and world leaders. What protocol or security concerns will need to be addressed?

My in-house staff know my entertaining preferences. When do I need to consider additional management resources if I'm going to host a complex, high-profile event?





# PROPERTY & HOUSEHOLD OPERATIONS ASSESSMENT

## COMPREHENSIVE ASSESSMENT

One-on-one meeting(s) with Client.

Conduct property site tours and interviews with Family Office staff, employees, and key service providers.

**Administer Property and Household Operations Assessment Questionnaire** to perform detailed analysis of the following core areas:

- Property Portfolio
- Facility/Maintenance Management
- Personal Service Delivery
- Budget Controls
- Staffing
- Technology/Smart Home
- Security Practices
- Event Management
- Collection Management

## MASTER PLANNING

Prepare a detailed **Executive Summary** with specific actionable recommendations for each core area.

Develop an **Operational Master Plan** to provide a roadmap for enhanced service delivery, increased efficiency, and improved return on investment.

Provide actionable recommendations for Client consideration, such as:

- Creation of new or realignment of current staff responsibilities and reporting lines.
- Best practices to improve efficiencies while preserving value of personal assets.
- Subject matter expertise in identified areas of need.

One-on-one meeting(s) with Client to review **Operational Master Plan** and recommendations.

## IMPLEMENTATION

Assist the Client, Family Office or Senior Estate Management with full or partial implementation of any desired initiatives, such as:

- New Staff Placement
- Staff Development and Mentoring
- Vendor Sourcing and Vetting
- Organizational Change Management
- Best Practice Implementation
- Standard Operating Process Documentation
- Inventory and Asset Management
- New Construction and/or Capital Project Management
- Subject Matter Expert Introductions
- Complex Event Management and Logistics

Provide ongoing guidance and support to ensure successful implementation.



# STAFFING AND PLACEMENT

## NEEDS ASSESSMENT

One-on-one meeting with Client.

Conduct site tour(s) and interviews with Family Office staff, employees, and key service providers, as appropriate.

Analyze staffing needs and Client preferences relative to current organizational structure.

Identify potential recruiting firm partners, if required.

Provide Client with a **Needs Assessment Report**, to include recruiting and compensation strategies.

## SEARCH AND PLACEMENT

Draft new job posting description(s) or edit existing.

Partner with identified recruiting firms to source qualified candidates.

Provide Client with **Initial Executive Briefing Document**, to include vetted shortlist of candidates for review.

Coordinate background investigations.

White glove support of final candidate interviews and travel arrangements.

Provide Client with a **Final Executive Briefing Document**, to include detailed information on final candidates.

Support Family Office with generation of an **Offer Letter**.\*

\*Family Office to generate employment agreement

## INTEGRATION AND PERFORMANCE ASSESSMENT

Prepare a **90-Day Integration Plan** to ensure successful placement.

Review Needs Assessment Report with new hire, as appropriate.

Facilitate new hire integration.

Conduct 30-day, 90-day, and six month reviews with new hire, informed by interviews with Client and internal stakeholders.

Provide Client with **30-Day, 90-Day and Six Month Progress Reports**.





# OWNER REPRESENTATION LUXURY DESIGN & CONSTRUCTION

## PRE-CONSTRUCTION PLANNING

Conduct site tours and interviews with Client, Senior Estate Management, project team members, and key service providers, as appropriate.

Conduct a **Project Risk Analysis** and identify mitigation strategies.

Develop a **Comprehensive Project Budget and Schedule**.

Assist Client with **Design Program Development** to clearly communicate their project goals and the project's operations requirements.

Identify and assist in engagement of project consultants (Design, Construction and Specialty Consultants).

Provide informed counsel, contract review, subject matter expertise, or other guidance as requested.

## PROJECT OVERSIGHT

Provide on-site observation, progress review, and quality control on behalf of Client.

Provide **Project Oversight Mentoring** to Client's staff.

Provide **Real-Time Reporting** on project status.

Coordinate secure site access and protect confidentiality of Client information.

Manage scope of Contractor and Consultant agreements.

Review and advise Client on Contractor and Consultant pay applications and change proposals.

Provide comprehensive **Project Accounting** (including Client's hard and soft costs) as desired.

Coordinate Client-supplied and installed items such as furniture, art, AV/IT, and security.

Assist in project conflict resolution and neighbor relations.

## OPERATIONAL TRANSITION AND TURNOVER

Develop **Project Closeout and Operational Turnover Plan including Client Move-In Schedule**.

Manage project closeout and warranty information and ensure secure electronic document transfer.

Oversee punch list process and attend final inspection with Architect.

Oversee commissioning process and assemble commissioning reports.

Review and negotiate final pay applications.

Provide ongoing guidance and support through warranty period.





# COMPLEX EVENT MANAGEMENT & LOGISTICS

## NEEDS ASSESSMENT

Conduct site tours and interviews with Client, senior staff members and service providers, as appropriate.

Assist Client with development of event goals, including budget, schedule, thematic designs, and measurable benchmarks for event success.

Review guest demographics to identify any unique support services required such as international protocol consultants and/or translators.

Assess logistical security requirements; partner with appropriate security providers and officials to ensure guest confidentiality and safety.

Identify and vet key event service providers and appropriate venue options for Client consideration.

Develop a Comprehensive Event Execution Plan.

## PRE-EVENT MANAGEMENT AND LOGISTICS

Coordinate design and procurement of all event collateral; coordinate and manage the guest RSVP process including updates to Client.

Develop a detailed **Event Flow** document of all key planning logistics and timelines.

Negotiate, contract with, and oversee all key event components including venue, production, entertainment, catering, security, AVIT. Develop **Run of Show Plan** to specifically manage all event production elements.

Coordinate and manage transportation logistics for guests and event entertainment.

Ensure all insurance, permitting and logistical regulations are properly secured.

Provide real time reporting on event planning status.

## EVENT EXECUTION AND CLOSEOUT

Manage all event production components and provide single point of contact for Client throughout.

Coordinate final logistics and ensure successful guest transfer, arrival and departure experience.

Oversee culinary service including menu, table décor and direction of service staff.

Identify and respond to potential security and confidentiality break-downs.

Manage event close-out and review and negotiate final vendor and venue payments.

Provide Client with **Post-Event Report**, including comprehensive event budget analysis.





# TAPESTRY LEADERSHIP

## ANNE LYONS, FOUNDER & CEO

Believing real property assets should be managed with the same discipline and professionalism as financial holdings, Anne conceived and founded Tapestry in 2010 to be a partner and advisor to the other side of the family office. Over the course of fifteen plus years directing and collaborating with family offices, private services staff, and other world-renowned consultants, Anne has developed an astute understanding of estate and luxury project management.

Prior to founding Tapestry Associates, Anne served nine years at Vulcan Inc., the family office of Paul G. Allen, where she was responsible for directing the development, interior design, construction and maintenance of an international portfolio of lifestyle holdings.

Before joining Vulcan, Anne spent ten years as a senior designer and project manager focused on commercial and healthcare design and construction. The rigor of her corporate experience, coupled with her insight into the complex needs of ultra-high net worth clients, informs Anne's client commitment and her disciplined, strategic approach to project delivery.

## JUDY BOERNER-RULE, PRESIDENT

Judy Boerner-Rule has thirty years of experience driving exceptional operations of private estates, luxury hotels and private clubs, and complex private events. Judy has an unparalleled talent for anticipating operational challenges and developing functional assessments to ensure an organization's team performs to its highest potential.

Prior to joining Tapestry, Judy served as the Senior Director of Properties for Watermark Estate Management Services LLC, the family office for Bill and Melinda Gates. In that role, she was responsible for all facets of daily estate operations, including finance, human resources, technology, event management, real estate development, facilities operations, and fine art and vehicle collection management.

Judy leverages her unique private family office experience to deliver private residential staffing services, including asset documentation, organizational assessments, recruiting, strategic vetting and compensation analysis.

Judy is also the founder of JBR Event Management LLC, a boutique consulting firm providing complete event production, management and logistics to ultra-high net worth clients and their related private businesses and philanthropic organizations.

## KERRY ALBRIGHT, DIR. FINANCE

Kerry Albright is a meticulous accounting professional with twenty-five years' experience assisting numerous privately held corporations in a variety of countries and industries.

In her role with Tapestry, Kerry oversees all areas of finance and accounting, payroll, human resources, and risk management. Prior to joining Tapestry, Kerry served more than six years at Vulcan Inc. managing the accounting operations for the Personal Assets Division. Kerry worked closely with members of the senior executive teams to manage and monitor the annual budgets and financial results of more than thirty departments in six countries.

Kerry's keen financial intelligence, astute understanding of business risk, and remarkable ability to articulate even the most complex accounting principles make her an indispensable advisor.

Kerry is also the founder of Albright Accounting Services, Inc., a full-service, Seattle-based accounting firm.



# TAPESTRY FEES

Tapestry tailors its services around each Client's specific needs and may be engaged on an hourly or retained basis or for a flat fee, depending on the scope of work desired.





WE WELCOME THE OPPORTUNITY TO SPEAK WITH YOU PERSONALLY

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