relationships

2 out of 3 client relationships are multigenerational.

With so much at stake, families need a wealth advisor who acts with integrity, honors commitments, and performs with excellence. At Bessemer, these are natural outgrowths of our governing principle of placing clients' interests at the heart of everything we do. In striving to help clients achieve their goals, we create lasting relationships that often span generations. Our client asset retention rate over the last 10 years is among the best in our industry, yet we won't be satisfied until we exceed all of our clients' expectations.

Raison d'être

Our sole mission is to help clients manage wealth so it has a positive impact on their lives and the lives of generations to come. Investment management is the central element of our service, but our work extends to the multiple layers of wealth-related matters, including minimizing income and estate taxes, passing values to younger generations, and improving the effectiveness of philanthropic endeavors.

We welcome the responsibility to be there for our clients when they need us and to anticipate their needs long before they might otherwise be apparent. Our 3:1 client-to-employee ratio is among the best in our industry and allows us the opportunity to work closely with clients on matters large and small. Recognizing the privilege and duty of confidentiality, we aggressively safeguard the trust clients place in us.

Top to bottom: Steve Watson, Greg Lester, Daphne Bradshaw-Mack, Harry Davison

3:1 client-to-employee ratio.

Acting in Clients' Best Interests

All clients have access to the same expert advisors and centralized investment management. Our platform reflects our belief that trustworthy counsel must stem from unbiased research and judgment rather than financial enticement to sell a product. We do not engage in investment banking, brokerage, underwriting, or commercial lending. This singular focus strengthens our relationships. Clients know our attention is undivided and our intentions are transparent.

Forming Personal Ties

One of the most important success factors in a client's experience with us is his or her Client Service team. The team is responsible for understanding clients' circumstances and harnessing the firm's diverse resources for their benefit. Because our Client Account Managers typically remain with Bessemer for many years — if not their entire careers — they develop a deep relationship with each client family.

We are devoted to assisting clients through major transitions in their lives, such as the sale of a business, retirement, marriage, divorce, births, and deaths. In many cases, we work with multiple generations as we help families grow their wealth and create enduring legacies. Trusts are a central component of most legacy plans, and the importance of choosing the right fiduciary cannot be overstated. Nearly two-thirds of our clients have named us trustee or co-trustee for one or more trusts. In what we consider the ultimate affirmation of trust, many clients select us as executor of their estate, exemplifying the full life cycle of services we provide.