Bessemer Trust Overview

At a Glance

- Multifamily office founded in 1907
- Industry-leading 3-to-1 client-to-employee ratio
- 19 offices globally, serving more than 2,500 clients
- Over $100 billion in assets under supervision
- 10-year client asset retention rate of 98%
- Financially stable with a strong balance sheet
- Trustee or co-trustee for more than 10,000 trusts, 60% of client relationships

Privately owned and independent, Bessemer Trust is a multifamily office that has served individuals and families of substantial wealth for more than 110 years. We offer comprehensive investment management, wealth planning, and family office services to help you and your family achieve peace of mind for generations.

Consistently recognized as a leading multifamily office, we provide highly personalized advice and service our clients know they can depend on. We take the time to understand each of your objectives in order to deliver long-term, fully integrated solutions to help you:

- Protect your lifestyle through economic cycles
- Increase your wealth beyond taxes, inflation, and fees
- Manage day-to-day financial complexities
- Transfer your wealth across generations and fulfill philanthropic goals

Dedicated Advisor Teams Delivering Fully Integrated Capabilities

Bessemer Trust clients experience a level of personal attention and service difficult to find elsewhere. Your Bessemer team works closely with you to provide customized, integrated solutions that reflect your unique circumstances and aspirations. Our senior team members average 27 years of industry experience and more than a decade with the firm. Our clients place their trust in us knowing they will have ongoing dialogue with a proactive, experienced, and loyal team.

A commitment to excellence in investment management, wealth planning, and client service has been our focus for more than 110 years and reflects our overarching mission: to provide peace of mind for generations.

The Bessemer Difference

Private ownership and independence
Results in continuity of purpose, stability, and objectivity

Singular focus on private wealth management
Allows us to deliver deep expertise

Alignment of interests among clients, owners, and employees
Encourages long-term success as we invest side by side

Culture of service, not sales
Strengthens our ability to provide appropriate and unbiased advice

Expert Advice and Personal Service

We deliver best-in-class expertise across investment management, wealth planning, and family office services. A thoughtful approach to planning enables us to integrate and align our broad capabilities with your unique objectives.

Investment Management

We customize your asset allocation to reflect your specific goals. Our investment approach is flexible and highly disciplined, taking advantage of our research insights to pursue attractive long-term returns. Using a mix of internal and external managers, we build multi-asset class, diversified portfolios designed to participate in strong markets while offering protection in down markets.

Wealth Planning

Wealth impacts all aspects of life – and your needs will evolve over time. We stand ready to assist with trust administration and estate planning, to develop strategies aimed at minimizing taxes and managing risks, to help communicate wealth plans to the next generation, and to give guidance on a strategic approach to philanthropy. Our wealth planning teams have one focus: providing advice to help you preserve and transfer wealth.

Family Office Services

We have helped clients manage the day-to-day complexities of wealth since 1907, when our owners, the Phipps family, founded the firm. This long history gives us unparalleled experience providing clients with a broad range of family office services, including custody and consolidated reporting, private banking, bill payment, and payroll.

For more than a century, individuals and families of substantial wealth have depended on Bessemer Trust for sophisticated advice on their complex financial needs. For more information on how our capabilities could offer you similar peace of mind, please contact your advisor. Minimum relationship size of $10 million.

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