

# Oil and Gas Advisory

## At a Glance

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Oil and gas rights can be enormously complex, and managing them effectively requires significant expertise and rigorous oversight.

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With more than four decades of experience and management of thousands of oil and gas interests across the nation, Bessemer's oil and gas advisory team has a thorough understanding of what it takes to manage and advise on oil and gas interests of every kind, wherever they're situated.

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## About Bessemer Trust

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

## Minimize Burdens, Maximize Returns

While owning oil and gas mineral rights can be a positive — and at times profitable — experience, it can also present complex challenges and burdensome administrative obligations. This is especially true when mineral rights portfolios consist of numerous holdings across multiple counties and states.

At Bessemer Trust, our experienced oil and gas advisors can help you

to address the many questions you may have about your mineral rights.

Do you own mineral rights? Have you identified all of them? Are any of them producing right now? Are you receiving all the revenues you're entitled to? Would it make sense to transfer your rights into a trust? If you decide to sell your rights, how much are they worth? If you've received a lease proposal, how can you determine if it's a good offer?

## Our Comprehensive Offering

### Land Management Services

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- Conduct asset determination and setup.
- Confirm ownership and assemble documents.
- Interpret and administer deeds, assignments, leases, contracts, etc.
- Perform title, due diligence, and curative services.
- Review and process Authorizations for Expenditure.
- Assist with preparing deeds and assignments.
- Research and recover suspended and/or escheated funds.
- Confirm net revenue interest.

### Accounting/Back-Office Services

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- Provide full bookkeeping services.
- Monitor working interest expenses and revenue distributions.
- Provide detailed revenue and expense reports and annual reviews.
- Review, process, and pay working interest invoices.

### Advisory Services

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- Provide lease and contract evaluations and negotiations.
- Perform well-proposal evaluations and elections.
- Provide valuation analyses.
- Advise regarding asset sales and divestitures.
- Help determine best vehicle for ownership of assets (estate and tax planning).
- Assist with environmental site assessment and remediation.
- Assist with marketing unleased mineral interests for lease.

## How We Work With You

Whether it's providing administrative oversight of your holdings, identifying and recovering revenues, seeking the best possible terms when new leasing opportunities arise, or any of the many and often complicated issues associated with mineral rights holdings, we can help to minimize your burdens and maximize your returns.

**Land management.** Many people own mineral rights because they've been passed down through their family over generations — and they may not have the expertise, time, or inclination to manage their rights effectively. Sometimes, these rights are associated with a single property. Often, however, mineral rights portfolios consist of numerous geographically scattered holdings. The complexity involved in managing these portfolios can be staggering. Even if it were possible to inspect, physically, each of the sites, the fact that no oil or gas wells are visible on the surface doesn't necessarily mean that no production is occurring, since horizontal (or directional) drilling from offset locations is now commonplace. Analyzing digital data resource maps, county tax rolls, states' unclaimed money funds, and other resources, we can determine whether your mineral rights have been tapped and, if so, take the necessary steps to enforce lease terms, recover past revenues, and bring you into the payment stream.

**Accounting/back-office services.** Depending upon your needs, we can assist you with any or all of a full range of back-office services — including bookkeeping, monitoring expenses and revenue distributions,

payment of invoices, and the many other administrative obligations of owning mineral rights.

**Advisory services.** We provide in-depth reviews of oil and gas portfolios, leases, and lease proposals. We can negotiate leases and contracts on your behalf, market unleased mineral interests for lease, and provide advice on asset sales. In addition, we can coordinate with our estate planning and tax experts — and your other advisors — to help determine the best ownership structure for your assets.

## The Bessemer Difference

For more than a century, we have helped wealthy individuals and families — often across multiple generations — to achieve their wealth management goals. These goals frequently involve the management of oil and gas mineral rights.

Our expert oil and gas professionals provide comprehensive and integrated management, accounting, and advisory services to owners of mineral interests throughout the United States — whether they are held in estates, trusts, business entities (partnerships, LLCs, etc.), or owned individually.

We can help you to develop and execute a mineral rights strategy tailored to your specific goals and seamlessly integrated with your overall wealth management plan.

*To learn more about Bessemer's oil and gas advisory services, please contact your client service team or your local Bessemer Trust office.*

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This material is for your general information. The discussion of any estate planning alternatives and other observations herein are not intended as legal or tax advice and do not take into account the particular estate planning objectives, financial situation, or needs of individual clients. This material is based upon information from various sources that Bessemer Trust believes to be reliable, but Bessemer makes no representation or warranty with respect to the accuracy or completeness of such information. Views expressed herein are current only as of the date indicated, and are subject to change without notice. Forecasts may not be realized due to a variety of factors, including changes in law, regulation, interest rates, and inflation.

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