

# **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 11,000 trusts, 60% of client relationships

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. 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 28 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.

# **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

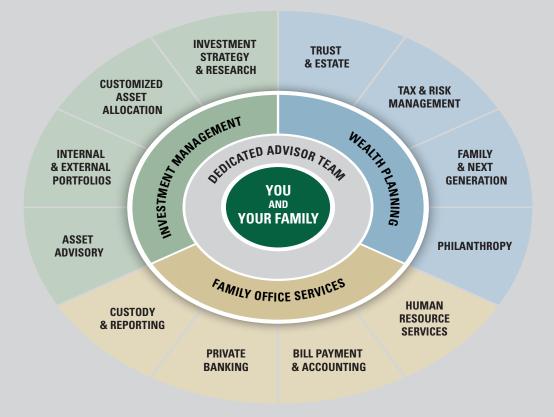
Alignment of interests among clients, owners, and employees Encourages long-term success as we invest side by side

#### 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.

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