BESSEMER TRUST

Family Office Services

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 115 years.

Through comprehensive investment management, wealth planning, and family office services, we help clients achieve peace of mind for generations.

In this piece, we provide specific information about our family office services. For more information about these or any of our capabilities, please contact your advisor.

At Bessemer Trust, we know that the financial lives of our clients can be remarkably complex. This is certainly true when it comes to investments and wealth planning, but it's also true when it comes to the day-to-day management of operational and administrative affairs.

To help ease the burden of these time-consuming and often challenging obligations, we offer a comprehensive suite of family office services.

Flexible Solutions to Meet Your Needs

More than 115 years after Henry Phipps founded Bessemer Trust as a single family office, we remain committed to providing our clients with highly customized family office solutions that best help them achieve their goals. Clients seek our flexible offering and advice when they want to:

- Access supplemental operational support in select functional areas
- Consolidate services performed by multiple family office providers
- Fully outsource existing family office operations
- Understand the considerations related to building a family office

Our Broad Offering

Custody and reporting: custody services, as well as consolidated portfolio reporting and analysis, for all family, entity, and trust assets across investment managers and custodians

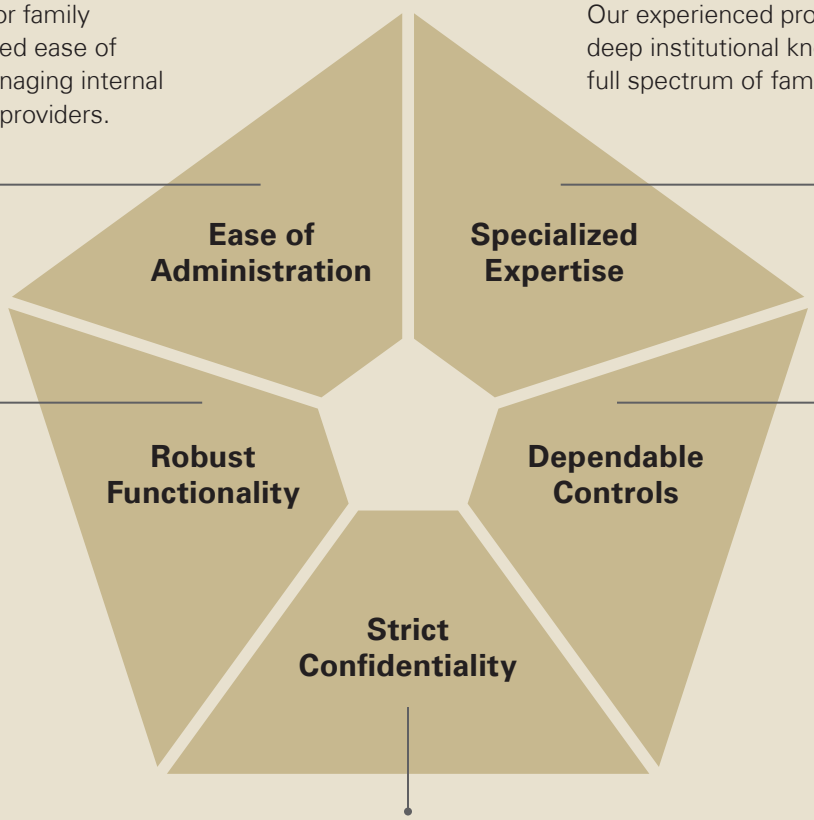
Private banking: checking accounts, money transfers, loans, currency-exchange services, letters of credit, and other private banking services

Bill payment and accounting: full financial accounting and bookkeeping support, as well as comprehensive payment services with detailed reporting capabilities, including entity accounts payable, employee expense reimbursement, and personal bill payment

Human resource services: a turnkey suite of employee human resource services, including policies, filings, hiring support, payroll, benefits administration, and training

Expertise and Service From a Seasoned Provider

Our combination of dedicated staff and deep expertise enables us to deliver an extensive suite of services that can be difficult to replicate at a reasonable cost. Because we are a multifamily office, we enjoy the advantages of scale, including the ability to price our services competitively within the marketplace.



Our single point of contact for family office services offers improved ease of administration relative to managing internal staff and/or multiple service providers.

Our experienced professionals provide deep institutional knowledge spanning the full spectrum of family office services.

Our sophisticated service platforms offer efficiencies, including an online human resources portal for entering timesheets and employee-benefit viewing.

Our integrated team approach offers risk management often beyond the capabilities of smaller firms, as well as seamless coverage that eliminates the risk common to many family offices of relying on one or a few individuals.

When it comes to managing sensitive information, we are a time-tested partner. Moreover, clients who consolidate their operations with us enjoy the privacy that comes from working with a single provider.

An Integrated Approach Delivered by Dedicated Professionals

Unique in the industry, Bessemer Trust offers truly integrated services supported by a dedicated team of specialists with a broad range of perspectives and skills. Our family office leadership team has, on average, 27 years of experience, including more than a decade with the firm. Families place their trust in us knowing that they are supported by a highly competent, proactive, and loyal team.

If you would like to learn more about our family office services, please contact your advisor.

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