



## BNY MELLON WEALTH MANAGEMENT

FAMILY OFFICE SERVICES  
201 WASHINGTON STREET, BOSTON, MA 02108 • (617)722-7832  
WWW.BNYMELLONWEALTHMANAGEMENT.COM

# Family Office Pioneer and Modern Leader

### Our Firm

BNY Mellon Wealth Management is among the nation's leading wealth managers, with more than two centuries of experience in providing investment management, wealth and estate planning, and private banking services to financially successful individuals and families, their family offices and business enterprises, charitable gift programs, and endowments and foundations. It is among the top 10 U.S. wealth managers with \$154 billion in private client assets and an extensive network of offices in the U.S. and internationally.

The Family Office Services group is an integral part of BNY Mellon's Wealth Management organization, enabling us to draw upon an unrivaled range of resources across all wealth management disciplines. Recognized as innovative since our founding, our industry-leading practices are grounded in centuries of experience and have successfully guided wealthy families and their advisors through prosperity and uncertainty. We thoughtfully integrate our high quality capabilities in a way that makes sense for each family, family office, or multi-family office, regularly expanding our resources to meet future needs.

### Our Strength

BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation. BNY Mellon is a global financial services company, focused on helping clients manage and service their financial assets, operating in 34 countries and serving more than 100 markets. BNY Mellon is a leading provider of financial services for institutions, corporations, family/multi-family offices, and high-net-worth individuals, providing superior asset management and wealth management, asset servicing, issuer services, clearing services and treasury services through a worldwide client-focused team. It has \$22.3 trillion in assets under custody and administration and \$1.1 trillion in assets under management, services \$12 trillion in outstanding debt and processes global payments averaging \$1.6 trillion per day. Additional information is available at [www.bnymellon.com](http://www.bnymellon.com)

### AT A GLANCE

#### Top 10 U.S. wealth manager<sup>1</sup>

- Approximately \$62 billion in family office services client assets under management, administration, or custody<sup>2</sup>
- \$154 billion in private client assets<sup>2</sup>
- Approximately \$7 billion in deposits and \$6 billion in loans outstanding<sup>2</sup>
- Among nation's largest family office and charitable gift services providers

#### Two centuries of experience and perspective

- Oldest private bank in U.S. history

#### Expansive network of offices, close to our clients

- Offices in 17 states and 3 countries

#### Primary Contact:

Eileen Foley, 617-722-7832  
[eileen.foley@bnymellon.com](mailto:eileen.foley@bnymellon.com)  
Glenn Prichett, 617-722-7802  
[glenn.pritchett@bnymellon.com](mailto:glenn.pritchett@bnymellon.com)

### A Little Known Fact About Our Firm

BNY Mellon has helped families build, manage and preserve their wealth for more than two centuries. Our heritage includes the establishment of the first dedicated family office organization in the United States, founded on behalf of the Mellon family and its charitable interests. Today, our Family Office Services group is one of the largest in the world, providing expansive resources, knowledge and proficiencies to the family office marketplace.

### Our Typical Client

Through our Family Office Services group, we apply the best thinking of our organization to the needs of the world's most financially successful families. The Family Office Services client base consists of approximately 300 families, family offices, and multi-family offices representing more than \$62 billion of total client assets as of December 31, 2009. We provide fiduciary, investment management, master custody services, private banking and finance, enhanced cash, partnership accounting and other related services. Today, Family Office Services has approximately 130 professionals located in our offices in Boston, New York, Pittsburgh, Los Angeles and London.

<sup>1</sup> BNY Mellon's wealth management business – BNY Mellon Wealth Management – is among the nation's ten largest based on 9/30/09 discretionary assets under management. BNY Mellon Wealth Management services are offered by subsidiaries of The Bank of New York Mellon Corporation, including The Bank of New York Mellon, BNY Mellon, N.A. and BNY Mellon Trust of Delaware. Source: BNY Mellon Wealth Management; based on publicly available information.

<sup>2</sup> As of 12/31/09