GLENMEDE
INVESTMENT AND WEALTH MANAGEMENT

1650 MARKET STREET, SUITE 1200, PHILADELPHIA, PA 19103-7391
215.419.6000 • 800.866.3200 • WWW.GLENMEDE.COM

Providing Investment Management and Family Advisory Services For Over 50 Years

Our Firm

Glenmede is an independent investment and wealth management firm founded in 1956 by the Pew family to manage the assets of their charitable interests. We now serve individuals, families, endowments and foundations throughout the United States. We're small enough to provide highly personalized service and yet, with over $18 billion in assets under management, large enough to provide access to a wide range of asset classes and world-class financial advice.

AT A GLANCE

Contact: Chip Wilson, Executive Vice President, Director of Client Services, chip.wilson@glenmede.com

Headquarters: Philadelphia, PA

Additional Locations: Delaware, New Jersey, New York, Ohio

Founded: 1956 by the Pew Family to manage the assets of the Pew Trusts

Assets Under Management: $18 billion as of December 31, 2009

Our Unique Features

Stability—Glenmede has over fifty years of experience providing investment management and family office services. Our strong and well capitalized balance sheet supports our independence and commitment to organization and staff stability.

Independence—Our independence ensures we are free from conflicts of interest and allows us to make long-term decisions in our client's best interests.

Focus—Glenmede's singular focus is investment and wealth management services. We do not have any commercial or investment banking operations, underwriting activities, or insurance affiliates. Our sole aim is to manage assets to reduce risk and increase expected return.

Our Strengths

Client-Focused Investment and Wealth Management—Glenmede is noted for exceptional client service—exceeding rather than just meeting expectations. With an outstanding 6-to-1 client to employee ratio, we ensure each relationship receives highly personalized service. We have very low professional turnover and, on average, our portfolio managers and trust administrators have over 25 years of industry experience. Glenmede has a 2-to-1 ratio of investment research to sales professionals, illustrating the premium we place on offering top quality investment advice.

Experience with the Pew Trusts—Glenmede's experience in managing the multi-billion dollar Pew Trusts allows us to leverage over 50 years of investment research and management for the benefit of our clients. Glenmede clients can invest in internal investment strategies developed specifically for the Pew Trusts and gain access to external investment managers unavailable to clients of smaller firms.

Wide Range of Family Office Services—Glenmede offers an extensive range of wealth advisory services to supplement our investment platform. This includes personal financial planning, estate planning, tax planning and services, philanthropic advisory, fiduciary services, and retirement planning. In addition, we provide general financial advice on issues impacting your financial well being, along with recommendations and referrals to providers of additional specialized services.

Our Typical Client

We provide thoughtful and intelligent investment and wealth management services for individuals, families, endowments and foundations. Our clients come from a broad geography and span generations, yet share a common goal – a desire to collaborate with a thoughtful partner and an interest in smart, sophisticated advice.

Glenmede is ideally suited to serve families and tax-exempt organizations with $5 million or more of investable assets.

Little Known Fact

Glenmede has consistently been recognized by the Luxury Brand Institute's private banking survey as one of the top three providers of quality service to high net worth individuals. This includes top rankings in two key areas: 'superior quality services' and 'willingness to recommend'. In addition, Glenmede continues to experience an exceptionally high client retention rate of 98%.