

GENSPRINGSM

FAMILY OFFICES

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A Leading Alternative to Traditional Wealth Management Firms

Our Firm And Unique Features

GenSpring Family Offices is a market leader among family offices and a leading alternative to traditional wealth management firms, providing tailored, conflict-free advice to wealthy individuals and families. GenSpring is open to using any professional, product, service or solution anywhere, and not financially incented to use one over another, with the singular goal of finding and integrating the optimal combination of advice and solutions, wherever they may be, for each client's situation. GenSpring's family offices combine comprehensive wealth management advice with deep talent and expertise to put control, power, knowledge and opportunity squarely on a family's side of the table.

Our Firm's Strengths

In our experience, the most compelling wealth management ideas never exist in a single person, place, company or country but in many—and change over time. GenSpring's expertise is in continually identifying attractive wealth management opportunities for our clients and integrating them into the overall management and governance of their wealth.

A Little-Known Fact About Our Firm

Our founder and founding families were driven in no small part to create GenSpring by their dissatisfaction with traditional wealth management providers: private banks, financial services firms, trust companies, etc. Though great advisors existed within those institutions, the institutions themselves had grown into a hub for the distribution of financial and investment products sold under the guise of advice. When you talk to these advisors, some of whom we've hired, they consistently describe situations of having had to protect their clients from their prior institution's insatiable appetite for selling. These institutions used their size and market power for their own self-interest—to gain access to investment managers or build products that they could sell to their clients or otherwise generate more income per client, such as through trading or the sale of derivatives. In these situations, the institutions benefited from their growth, not their clients.

AT A GLANCE

Contact: John Elmes, Senior Partner

Locations: GenSpring Family Offices is headquartered in Palm Beach Gardens, Florida and has 15 local offices in Atlanta, Charleston, Charlotte, Costa Mesa, Denver, Greenwich, New York City, Miami, Nashville, Orlando, Palm Beach, Phoenix, Tampa Bay, Sarasota, and Washington, DC.

Year Founded: 1989 – founded as a Multi-Family Office

Total Assets Under Advisement: Approximately \$20B

Conversely, GenSpring does not earn incremental revenue as a result of the advice we give or the solutions we utilize. GenSpring's growth translates into more choices, market power and resources for our client families.

Our Typical Client

A typical GenSpring client seeks the benefits of a family office for overseeing and managing their wealth and the related risks. They seek the freedom and independence of an objective, aligned team of advisors helping them achieve their goals. Since its founding in 1989, GenSpring has been chosen by more than 700 families around the world to guide them in important aspects of their financial lives. GenSpring understands that significant wealth offers tremendous opportunity, but with opportunity comes complexity and challenges: investing, regulations, taxes, wills, trusts, children, philanthropy, in-laws, spending and far more...the issues that follow can keep you awake at night. Unlike traditional wealth management firms, GenSpring is uncompromising in its ability to solve the complex needs of today's wealthiest families—putting control, power, knowledge and opportunity squarely on their side of the table.