



## Northern Trust

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# Working With Generations of Families for 120 Years

### Our Firm

Northern Trust is a premier wealth management firm founded 120 years ago on the principles of service, expertise and integrity. We have worked with generations of families and their advisors, offering fresh perspectives and creative thinking, backed by cutting-edge technology and customized solutions.

### Our Unique Features

Consistent financial strength is a hallmark of Northern Trust and is a testament to our time-tested business model and our unique culture. We are one of only six U.S. bank holding companies with a credit rating of AA- or better from Standard & Poor's. Northern Trust holds a unique position in the financial services industry because we have remained undiluted by mergers and acquisitions. The primary benefit to our clients is that we are not distracted by the need to integrate multiple operating systems, to redefine our business focus or to merge differing cultures. Instead, we have chosen to grow organically, which has allowed us to remain focused on our clients and professional relationships.

### Our Strengths

At Northern Trust, we have been working with successful families for more than a century and in doing so have gained experience and insight into managing the intricacies of significant wealth. Our conservative approach to wealth management and rigorous risk management process provides our clients the comfort of knowing why and how their assets are invested.

### Our Typical Clients

Our typical clients have multiple advisors and need a strategic partner to coordinate and integrate the critical thinking of all advisors, to develop and execute a solid, strategic and cohesive wealth plan, and to provide high level, integrated performance reporting and performance analytics. Our clients benefit from both financial and personal services: sophisticated asset management, global asset servicing, strategic planning services, family governance and education and lifestyle management.

### AT A GLANCE

**Assets Under Management:** \$627.2 Billion

**Assets Under Custody:** \$3.7 Trillion

**Balance Sheet Assets:** \$82.1 Billion

**Loans and Leases:** \$27.8 Billion

**Total Equity:** \$6.3 Billion

**Ownership Structure:** 11% Closely Held

**Market Capitalization:** \$12.7 Billion

**Number of Years in Business:** 120

**Number of Locations:** 79 locations in the United States and 17 international locations

#### Rankings

- Best Private Bank in Northern America – *Financial Times* Group
- Best Private Bank in North America for Family Office Services – *Euromoney* Magazine
- Ranked among the Top 10 Wealth Managers – *Barron's*
- Serving More than 20% of Forbes 400 Most Affluent Americans – *Forbes*
- Ranked Among 50 Best Corporate Performers – *BusinessWeek*

### A Little-Known Fact About Our Firm

Northern Trust was founded in 1889 by Byron Laflin Smith, and the Smith family leadership continued for 90 years. Our heritage as a family business makes Northern Trust uniquely qualified to assist families and their businesses with complex financial situations. Northern Trust's expertise in trust and estate services is well known, but some may not be aware that we provide integrated solutions including financial planning, investment management, private banking, and family office services. We also have unique expertise in managing special assets such as family businesses, real estate, agriculture and oil gas and minerals that provides a singular benefit to our clients.