

PITCAIRN

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Sustaining Wealth Across Generations

Our Firm

Pitcairn is an independent multi-family office, providing families with unparalleled advice and service to ensure the preservation and growth of multi-generational wealth. We offer critical services to single family offices facing important transitions. Pitcairn is recognized as an innovator and a leader by clients, peers and influencers. Since our founding as a family office in 1923, we have focused on our single mission: Sustaining generational wealth. Today, we continue to redefine the family office experience for generations of the world's wealthiest families.

Our Unique Features

Pitcairn is one of the few owner-operated firms to have evolved from a single family office to a multi-family office. We combine the best attributes of a service-oriented boutique with sophisticated technology and the extensive expertise of our internal resources and our broad network of specialist advisors. Cutting-edge investment advice is an important aspect of the value we bring to our client families, but our clients continually remind us that it's the full integration of advice around all elements of their wealth structure, both the financial and non-financial, that delivers the most powerful results.

Our Strengths

We have successfully transitioned wealth across multiple generations of families as a result of the combination of effective planning, thoughtful governance, a commitment to education, and strong investment results. Our families have benefited from collaboration among our centralized planning team staffed by highly credentialed in-house experts on investments, financial planning, tax planning and compliance, estate and trust planning, trust administration, philanthropic planning and risk management. Furthermore, Pitcairn's 100% open architecture approach to investments reflects our commitment to objective advice and fee transparency. We are especially proud of the success of our investment advice, which has generated strong results for our clients during the recent market upheaval.

Our Typical Client

Pitcairn works with multi-generational families and single family

AT A GLANCE

Pitcairn offers a full array of family office services ranging from: Comprehensive planning (estate, tax, philanthropic); investment advice and implementation; customized education for families; advice regarding governance and succession planning; fiduciary services from serving as a corporate trustee to serving as agent for the trustee; administrative services including bill paying, tax compliance, partnership accounting and personal financial accounting

Contact: Rebecca A. Meyer, Managing Director

Office locations: Philadelphia (headquarters), New York & Washington, DC

Year founded: 1923

Ownership of firm: Privately owned by the Pitcairn family and by officers of Pitcairn

Number of employees: 70

Number of client families: 100

Assets under advisement: \$3.4 billion

offices filling one need or providing comprehensive solutions. Our clients are wealth creators and inheritors with a minimum of \$25 million in investable assets who want to engage the next generation. The families we work with have complex needs and are seeking sophisticated advice to ensure that family wealth continues to be a source of strength for future generations. Our clients see value in collaborating with a trusted partner who can help execute the daily details, while still insuring that their important family goals, both financial and non-financial, are being met.

Little-Known Facts About Our Firm

In addition to the relationships we have built with our multi-generational families, Pitcairn works with single family offices seeking counsel on issues that range from strategic planning to more cost-effective approaches to providing advice, administration and operations. We have helped them assess how their current practices measure up to industry standards as well as provided recommendations and implementation for improving investments, accounting and operational controls, and technology and governance practices.