

Silver BridgeSM



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Partnering with you and your family advisors to customize solutions for life's complexities

The Silver Bridge Heritage

Silver Bridge has served as a steward for the wealth and legacies of successful individuals and families for more than 80 years. Today, Silver Bridge is an owner-managed, privately held boutique.

Silver Bridge Family Office Partners is dedicated to addressing the complex needs of multi-generational families and family offices in today's challenging economic and regulatory environments. We believe that we have built a transparent business model with a truly differentiated multi-family office platform and flexible service offering.

Our Unique Features

Since each family is unique, we offer three service models which can be further tailored to meet one's specific needs:

- **Customized Resources**—Offering a broad-based and integrated set of services that can be used individually or in any combination for optimal flexibility.
- **Outsourced Solutions**—Partnering with Single-Family Office Executives to help take care of the areas where they need help.
- **Dedicated Family Office**—Providing full family office capabilities should a family wish for us to serve all roles.

Additionally, our clients have full access to **Silver Bridge Institute**, an educational platform designed for individuals, families, and family office professionals; providing customized seminars, workshops, forums, private sessions, research and publications.

Our Strengths

Silver Bridge Family Office Partners strives to help families achieve their goals and manage their challenges by acting as a trusted partner and delivering objective advice and flexible solutions in a collaborative manner. It is our goal to provide clients with the information and knowledge they need to make well-informed decisions with confidence.

Family Office Client teams combine years of experience, honed at leading wealth and investment management firms, with extensive credentials and deep expertise across multiple disciplines. They are committed to delivering customized solutions and exceeding client expectations at all times. To consistently provide forward thinking,

AT A GLANCE

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Locations: Headquartered in Boston, MA with offices in Plymouth, MA, Greenville, DE and San Francisco, CA.

Website: www.silverbridgeadvisors.com
or www.familyofficepartners.com
\$3 Billion Assets under Advisement

innovative planning and advice in today's complex world, each Family Office Client Team is supported by centrally managed subject matter experts who bring best practices to each client interaction.

Equally important is our proprietary business infrastructure and suite of applications that provide the Client Teams with state-of-the-art technology, operational and administrative tools and the support needed to help them anticipate and respond to client requests in an accelerated and effective manner. Our powerful technology and reporting provides our clients with a comprehensive view of their assets, and empowers them to make knowledgeable decisions

Our typical client

Our clients are successful individuals (entrepreneurs, corporate executives, family business owners and heirs to family wealth), multi-generational families, and single family offices located throughout the United States. They all have complex needs that require a trusted advisor to help simplify their lives and ensure they make thoughtful decisions for future generations.

Silver Bridge Family Office Partners specifically works with family offices in need of a trusted partner to whom they can outsource critical investment, financial, and administrative activities.

We partner with our clients' existing advisors to help ensure a flawless execution of administrative and investment activities.

Little-known facts about our firm

- Silver Bridge Family Office Partners (SBFOP), a newly launched subsidiary of Silver Bridge (Appendix B), serves the needs of 28 families.
- We are compensated only by our clients and receive no commissions.