TIEDEMANN ADVISORS

FIRM SUMMARY

WHO WE ARE

We provide customized, objective investment management and trust, estate and wealth planning services for high-net-worth individuals, families, trusts, endowments and foundations.

Clients choose Tiedemann because of our commitment to aligning with their financial goals and values, the breadth and depth of our services, our broad experience working with families and foundations, and our culture of excellence and long-term partnership.

$21B+

As of 7/2019

IN ASSETS UNDER ADVISEMENT(AUA)

$1.7B

As of 7/2019

IN FOUNDATION AND ENDOWMENT INVESTMENTS

$2.4B

As of 7/2019

COMMITTED TO IMPACT STRATEGIES

Founded in 1999, Tiedemann Advisors has offices in nine cities around the country, including our Tiedemann Trust Company located in Wilmington, Delaware.

OUR TEAM

Tiedemann is 100 percent privately owned, and we encourage all our associates and board members to be equity owners and invest alongside our clients. Our ownership model means we attract and keep great people. And our low client-to-advisor ratio means that each client gets the attention they deserve. Each Tiedemann client relationship is served by a diverse team of professionals covering investments, wealth and estate planning, and education.

MAINTAIN A RATIO OF FEWER THAN

25

CLIENTS PER ADVISOR

As of 07/2019

$490

MILLION

As of 07/2019

OF PARTNER/EMPLOYEE/ DIRECTOR ASSETS INVESTED ALONGSIDE OUR CLIENTS

OUR SERVICES

INVESTMENT MANAGEMENT

Our investment advice is transparent and objective. There are no hidden fees and no preferences between active and passive investments. We construct portfolios across asset classes aimed at preserving capital and achieving optimal risk-adjusted returns. We enhance portfolio performance by selecting, analyzing and monitoring third-party managers unavailable to many other firms.

WEALTH PLANNING

We provide robust estate and philanthropic, tax, insurance and succession analysis and planning, liquidity management and ongoing oversight. Our planning experts work in partnership with our investment professionals and coordinate with our clients' other advisors to ensure that their plans harmonize with the bigger financial picture and achieve their short and long-term goals.

IMPACT INVESTING

Impact investing is fully integrated through our investment team and aligned with our mission and corporate values. Our proprietary tool translates a client's goals into investments that affect change in environmental sustainability, education, financial wellness and other global and social issues. Our impact investing leadership has deep experience and a track record for achieving positive impact portfolios with competitive returns.

TRUST & ESTATE

Through our Tiedemann Trust Company, we provide full corporate trustee and executor services. Our Delaware location provides many advantages, including administrative flexibility, enhanced confidentiality and superior asset protection. Delaware also permits trusts to continue in perpetuity, providing families with substantial opportunities to preserve and grow assets for generations.

Signatory of: PRI Principles for Responsible Investment

FAMILY WEALTHREPORT AWARDS — WINNER

BEST OUTSOURCED CIO

BEST MULTI-FAMILY OFFICE

BARRON'S

TOP 20 INDEPENDENT ADVISORY FIRM

FT FINANCIAL TIMES | Top Financial Advisers

TOP FINANCIAL ADVISOR

pam PRIVATE ASSET MANAGEMENT

BEST TRUST & ESTATE DIVISION