

DIRECTORY OF MULTIFAMILY OFFICE  
AND WEALTH ADVISORY FIRMS

2011

- Acacia Wealth Advisors
- Argos Wealth Advisors
- Arlington Partners Family Office
- Ashbridge Investment Management, LLC
- Aspiriant
- Athena Capital Advisors, LLC
- Baldwin Management, LLC
- Ballentine Partners, LLC
- BBR Partners LLC
- Bessemer Trust Company, N.A.
- BKD Wealth Advisors, LLC
- BNR Partners LLC
- Calibre
- Catalyst Financial Planning  
& Investment Management
- Cherry Tree Family Office
- Convergent Wealth Advisors
- Coppertree, Ltd.
- Coyle Asset Management
- Cypress Wealth Advisors LLC
- Filament, LLC
- Financial Clarity, Inc.
- Financial Controllers, Inc.
- Financial Management Partners
- Financial Vision LLC
- GenSpring Financial Advisors
- Gleneagles Group
- Gresham Partners, LLC
- Greycourt & Co., Inc.
- Halbert Hargrove
- Harris myCFO Inc
- Hawthorn
- Highmount Capital LLC
- Hillview Capital Advisors, LLC
- Hudson Advisor Services, Inc.
- J & T Roush Family LLC
- Jacobus Wealth Management, Inc.
- Kochis Fitz
- Laird Norton Trust Co.
- Lau Associates LLC
- Legacy Trust Company
- Legacy Wealth Group
- Legg Mason Investment Counsel
- Lexington Family Office Services, LLC
- Lipson Group Inc.
- Lowenhaupt Global Advisors
- Mahoney Cohen Family Office Services,  
LLC
- Manchester Capital Management
- Marquette Asset Management
- Meristem
- New York Private Bank and Trust
- Northern Trust Wealth Management Group
- Northwood Stephens Private Counsel Inc.
- OPTIVEST, Inc.
- Oxford Financial Group, Ltd
- Pepper International LLC

DIRECTORY OF MULTIFAMILY OFFICE  
AND WEALTH ADVISORY FIRMS

2011



3801 PGA BLVD., SUITE 555, PALM BEACH GARDENS, FL 33410  
866.506.1989 • WWW.GENSPRING.COM

**Q Briefly describe your firm.**

A market leader among family offices and other independent advisors, GenSpring Family Offices is trusted by more than 700 families in 17 countries to manage important aspects of their financial lives.

At GenSpring, we are passionate about what we do. It is our desire to provide wealth without worry. Experience tells us that successfully doing so requires that we do more than just invest money. For the families we serve, tax planning involves more than filling out a tax return; estate planning is more than writing a will; and philanthropy is more than simply writing a few checks every December. For the families we serve, these and other aspects of wealth are connected. They can have a dramatic impact on each other and lead to financial disaster or seemingly unlimited opportunities. And, for the families we serve, money is about more than what it can buy.

Since its founding in 1989, GenSpring has created a community of wealthy families and wealth management professionals who share similar values and together put unprecedented control, power, knowledge and opportunity squarely on a family's side of the table.

**Q How was your firm founded?**

GenSpring Family Offices was founded in 1989 in Palm Beach, Florida by Hap and Ellen Perry with the support of a handful of "founding families" and industry luminaries. While adhering to the original premise, GenSpring's founders set out to improve upon the family office model in three ways:

**1. Create a "multi-family" office**

By serving multiple families from multiple family offices, GenSpring is able to wield much greater buying power on behalf of its clients to reduce costs and access leading talent and providers while sharing best practices across families

**2. Advise over all aspects of wealth**

Integrate and cost efficiently manage all elements of wealth, financial and non-financial, to improve the likelihood of long-term success and family unity

**3. Professionally manage for sustainability**

Create a professional family office organization that can provide wealth management stability through life events and continuity across generations

**Q What are the most important questions to ask a wealth advisor or MFO?**

In order to know you advisor is working for you, as your advocate, rather than in their own or their firms' interest ask these questions and get the answers to each, in full, in writing:

- Do you promise to provide conspicuous, full and fair disclosure of all important facts relating to the product or recommendation?
- Are you obligated to put my interests before your own or your firm's, at all times, as a fiduciary to me?
- Will you disclose conflicts of interest?
- Will you fully disclose in writing, all fees, compensation and expenses that you or your firm receive from me—and who else is paying you to recommend products I buy from you?

If they are not willing to answer "yes" to each of these questions then the firm is not willing or able to work for you, in your best interest as your advocate. It's as simple as that.

AT A GLANCE

- Number of Clients Worldwide: 701
- Countries Represented: 17
- Assets Under Advisement: \$23 billion
- Discretionary Assets: \$10 billion
- Number of Family Offices: 14 (Atlanta, Charlotte, Costa Mesa, Denver, Greenwich, New York City, Miami, Nashville, Orlando, Palm Beach, Phoenix, Tampa Bay, Sarasota, and Washington, DC)
- Number of Employees: 366

As of March 31, 2011

## DIRECTORY OF MULTIFAMILY OFFICE AND WEALTH ADVISORY FIRMS

2011



# OXFORD

11711 NORTH MERIDIAN STREET, SUITE 600, CARMEL, IN 46032  
317.843.5678 • WWW.OFGLTD.COM

### Q Briefly describe your firm, its offerings and its mission statement.

Oxford is the premier multifamily office in the Midwest, among the largest RIA firms in the country, overseeing more than \$16 billion in assets. Oxford offers a complete range of services and access to global investments, best-in-class multi-generational estate and financial planning strategies. Clients work with a dedicated advisor/partner, passionately committed to their success.

Oxford, at its very core, is thoughtful in the way we provide sound advice and unparalleled service; insightful in the way we provide unique perspective and unbiased counsel; and committed to excellence for generations to come, for both our clients and ourselves. We work to enhance our clients' financial lives while ensuring and enriching the legacies of their families—all through our rare, unique combination of global capabilities and Midwestern sensibilities.

### Q Describe your investment strategy and how it might be unique.

Oxford's investment philosophy focuses on adding value through multiple sources. Some sources are fairly straightforward, such as investment policy development, asset allocation, and manager selection. Others are less obvious but just as important, such as risk management and tax management. We also create ways for clients to access investment opportunities they otherwise might not be able to take advantage of, such as alternative investments. Our portfolio construction process focuses on combining the right money managers and asset classes for each situation.

### Q What do you consider to be the most important factors when evaluating a wealth advisor or MFO?

There are many important factors to consider when hiring a wealth advisor. The ultra-affluent families Oxford serves often cite our conflict-free advisory model and depth of talented professionals as two key reasons they hired Oxford. As a fee-only advisor, we do not share in the revenues of investment managers or financial prod-

ucts we recommend, nor do we accept commissions or any other form of compensation that might taint our advisor. While many of our large competitors in the banking and brokerage industries can make claims to deep resources, few offer non-conflicted advice.

### Q How has your firm adapted during the recent economic downturn, and what new opportunities have developed for your firm and your clients?

The experience of the past three years has validated Oxford's investment philosophy and overall approach to portfolio construction and risk management. Communication with clients was a key element in successfully navigating through the crisis. Our high-touch approach to client service helped manage client anxiety during the worst of the market downturn, and has helped create realistic expectations as the economy and financial markets have recovered. This experience has also revealed conflicts of interest in the banking and brokerage advisory models, further confirming Oxford's business model as an independent and objective RIA.

### AT A GLANCE

- Ownership of firm: Privately held
- Office location(s): Indianapolis, Indiana, Chicago, Illinois, Cincinnati and Columbus, Ohio, Grand Rapids, Michigan
- Number of employees: 120
- Number of client families: 76 multi-generational families
- Assets under advisement: Over \$16 billion (including assets under management)
- Average client net worth: \$10 million
- Relationship manager/client ratio: 1:5 manager/multi-generational client ratio



DIRECTORY OF MULTIFAMILY OFFICE  
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# HAWTHORN

PNC Family Wealth

**Q Briefly describe your firm, its offerings and its mission statement.**

Hawthorn is one of the country's largest and most successful multifamily offices\* managing nearly \$21 billion in assets.\*\* Hawthorn delivers integrated wealth management services to ultra-affluent individuals and families by combining investment management with financial, tax and estate planning, as well as by providing private banking, custom reporting and personal administrative services. Hawthorn's unbiased and independent advocacy is dedicated to safeguarding wealth and aligning assets with family values, lifestyles and aspirations. Hawthorn is committed to exceeding expectations, building trusting relationships and acting as experienced guides for the next generation.

**Q Describe your investment strategy and how it might be unique.**

Hawthorn believes that the growth and protection of capital can best be achieved through an integrated, diversified, valuation-based and tax-aware investment approach. Hawthorn's proprietary asset allocation and risk modeling enables us to build portfolios of non-correlated assets. This helps minimize volatility while increasing the probability that our clients will achieve long-term portfolio objectives.

**Q What do you consider to be the most important factors when evaluating a wealth advisor or MFO?**

Honesty, objectivity, expertise, execution and a comprehensive, yet scalable approach are all crucial factors and the hallmark of Hawthorn. With the discipline to adhere to our investment philosophy and the flexibility to keep pace with evolving objectives,

Hawthorn emphasizes building a relationship with clients and their families that will deepen over time. Each client service team is dedicated to constructing customized plans; providing transparent and customized reporting; and a robust technology platform to leverage both regional and national resources.

**Q How has your firm adapted during the recent economic downturn, and what new opportunities have developed for your firm and your clients?**

The recent economic downturn in many respects has validated Hawthorn's business model because it affirms the need to have a trusted guide to navigate the economy and the myriad of financial, estate and tax planning issues that will impact the ultimate success of plans. With a diligent focus on service and execution, Hawthorn is committed to handling the complex financial responsibilities of wealth so our clients and their families can spend more time enjoying it.

## AT A GLANCE

- Ownership of firm: The PNC Financial Services Group, Inc.
- Office location(s): Baltimore, Cleveland, Philadelphia, Pittsburgh and Wilmington, DE
- Number of employees: 125
- Number of client families: >500
- Assets under advisement: \$20.9 Billion\*\*
- Average client net worth: \$50 Million
- Relationship manager/client ratio: 15:1

\*2010 Survey results by the Family Wealth Alliance of Wheaton, Ill., a national independent organization for ultra-high-net worth investors and advisors

\*\* As of 03/31/2011

Hawthorn is a registered service mark of The PNC Financial Services Group, Inc. ("PNC"). Hawthorn provides investment consulting, wealth management and fiduciary services, certain FDIC-insured banking products and services and lending of funds through the PNC subsidiary, PNC Bank, National Association, which is a Member FDIC, and provides certain fiduciary and agency services through the PNC subsidiary PNC Delaware Trust Company. Hawthorn and PNC do not provide legal or accounting advice and neither provides tax advice in the absence of a specific written engagement for Hawthorn to do so.

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DIRECTORY OF MULTIFAMILY OFFICE  
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**ROCKEFELLER**  
F I N A N C I A L

10 ROCKEFELLER PLAZA, 3RD FLOOR, NEW YORK, NY 10020  
212.549.5100 • WWW.ROCKEFELLERFINANCIAL.COM

**Q Briefly describe your firm, its offerings and its mission statement.**

Rockefeller Financial is a leading global wealth management firm providing sophisticated solutions to wealthy individuals, families, family offices, foundations and endowments. Our history dates back to 1882, when John D. Rockefeller established one of the first family offices. The firm became an SEC-registered investment adviser in 1980. Our mission spans four businesses:

- **Wealth Advisors:** Objective advice and comprehensive services to meet the wealth management and trust company needs of our select clientele
- **Asset Management:** Customized global equity and fixed income portfolios
- **Capital Partners:** Tailored advice and portfolios of hedge funds, private equity funds and other alternative investments
- **Rockit® Solutions:** Proprietary technology coupled with experienced professionals to provide comprehensive and timely financial information

**Q Describe your investment strategy and how it might be unique.**

Rockefeller Financial's investment philosophy is focused on enhancing our clients' financial well-being and building on the value that they have already created. We employ a comprehensive process that seeks to preserve capital by addressing risks often ignored by other investment advisors. Our investment philosophy focuses on active portfolio management. We believe that customized asset allocation, active risk management, active securities selection and the creation of portfolios that are tailored to the client's needs can add significant value over time, over and above the returns that can be achieved through passive management.

**Q Why are you considered a leading wealth advisory firm?**

In seeking to align our interests with our clients' investment objectives, and through our years of experience, we can provide a

level of service that we believe is distinctive and of a quality that is unique in our industry. Rockefeller Financial has focused on building the knowledge and infrastructure required to help ultra high net worth families successfully manage their wealth. Today we stand as a leading, fully integrated wealth management firm, providing financial advice and administrative services including integrated portfolio accounting and reporting services and a wide array of trust and wealth management services.

**Q How has your firm adapted during the recent economic downturn, and what new opportunities have developed for your firm and your clients?**

Simply put, we've grown since the financial crisis. We have welcomed a number of new clients who were drawn to the stability of our private ownership structure. We have also benefitted from the ability to recruit talented professionals to expand our capabilities and client service. Furthermore, we have launched new investment strategies to take advantage of market opportunities. What hasn't changed, though, is our focus. Whereas many wealth management firms have had to reprioritize, we remain focused on serving the wealth management needs of a select group of families, foundations and institutions.

AT A GLANCE

- Ownership of firm: Private
- Office location(s): New York (Headquarters); Boston; Washington, DC; Wilmington, Del.; Stamford, Conn.
- Number of employees: 236 (as of March 31, 2011)
- Number of client families: 276 client relationships
- Assets under advisement: \$29 billion in total assets under administration (as of March 31, 2011)
- Average client net worth: Approximately \$100 million
- Average Relationship Manager/Client relationship ratio: 1:16

## DIRECTORY OF MULTIFAMILY OFFICE AND WEALTH ADVISORY FIRMS

2011



**SPRUCE**

WHERE RISK MANAGEMENT  
HAS MEANING.

ONE STAMFORD PLAZA, 263 TRESSER BOULEVARD, 15TH FLOOR, STAMFORD, CT 06901  
203.428.2600 • WWW.SPRUCEINVEST.COM

### Q Briefly describe your firm, its offerings and its mission statement.

Spruce is an award-winning leading investment advisor, which advises on \$3.2 billion as a Chief Investment Officer for 45 family offices, foundations and endowments. Our staff comes from respected firms such as Tiger Management, Ziff Investments, Oppenheimer, J.P. Morgan, MIT's Lincoln Labs, Oak Hill, and SAC. We have built a stellar ten-year track record through multiple market cycles as measured by clients' compounded growth rates, performance during market stress events, and perhaps most importantly, by our long-term client retention rates. While the firm leads with asset allocation analysis, it is best known for its leading edge risk management systems, analysis of alternative investments, and early stage access to global investment opportunities.

### Q Describe your investment strategy and how it might be unique.

Spruce employs an independent investment process that mitigates both market and manager risk through broad asset class diversification, active risk management and portfolio hedges. Our goal is to ensure no single event or entity affects our clients' wealth.

We employ truly unique, proprietary risk systems that analyze when to reduce equity risk, how to measure "forward-looking" tail risk, and how to risk budget third party managers. Unlike many other firms, we focus on tail risk—*not* standard deviation—as the latter routinely underestimates large losses. Our risk process has served our clients well during periods of "extreme" market stress.

### Q What do you consider to be the most important factors when evaluating a wealth advisor or MFO?

**Quality People:** Investment performance is driven by the quality of the entire firm, not just senior management. Know your whole team.

**Robust Investment Process:** Does the firm deliver consistent, sustainable alpha through different market cycles or does it rely on

over-allocation to risky assets to drive portfolio returns? How was your performance in 2008?

**Active Risk Management:** Ongoing, *portfolio-level* research is crucial. To mitigate losses, an advisor must take a proactive approach to managing risk, especially during market crises.

**Objectivity:** Truly independent advice is given by firms that are compensated solely by clients—not by third parties.

### Q How has your firm adapted during the recent economic downturn, and what new opportunities have developed for your firm and your clients?

Spruce's well diversified portfolios significantly mitigated portfolio losses during the recent crisis. Our systematic draw-down control model enabled us to take proactive steps to protect capital. We have expanded our liquid investment options (including equities, fixed income, high income and liquid absolute return partnerships) so that we can continue to optimally react to changing market conditions. Finally, Spruce continues to invest globally in higher growth/lower debt economies such as Brazil, China and even Africa. These allocations are typically made through hedge funds, private equity or real estate.

#### AT A GLANCE

- Ownership of firm: Two executive partners own 100% of the firm
- Office location(s): One
- Number of employees: 18
- Number of client families: 45
- Assets under advisement: \$3.2 billion
- Average client net worth: \$75M
- Relationship manager/client ratio: 1:10

## DIRECTORY OF MULTIFAMILY OFFICE AND WEALTH ADVISORY FIRMS

2011



**SILVERCREST**  
ASSET MANAGEMENT GROUP

1330 AVENUE OF THE AMERICAS, 38TH FLOOR, NEW YORK, NEW YORK 10019  
212.649.0727 • WWW.SILVERCRESTGROUP.COM

### Q Briefly describe your firm, its offerings and its mission statement.

Silvercrest Asset Management Group is an independent investment advisory and financial services firm which provides traditional and alternative asset management and focused family office services to wealthy families and select institutional investors.

Silvercrest's wealth and investment management services include proprietary equity and fixed income strategies as well as innovative alternative investments, all customized to meet the needs of individual investors. Estate and wealth planning services include tax preparation; financial planning and reporting; and family office services. Silvercrest seeks to combine modern theories of portfolio construction, risk management and diversification with superior client service. The quality, integrity and independence of our advice, coupled with our unwavering commitment to client service, sets Silvercrest apart in a crowded field.

### Q Describe your investment strategy and how it might be unique.

Silvercrest's primary objective is to deliver excellent investment results by offering a combination of core proprietary investment capabilities complemented by "best of class" outsourced capabilities for those clients seeking diversification beyond our own offerings. All of Silvercrest's investment capabilities have performed well in past market cycles and have done so with relatively attractive levels of risk and tax efficiency. Our proprietary investment capabilities are quality-oriented, value-based and highly disciplined. Likewise, we believe our outsourced investments are what they purport to be: best of breed, complementary and carefully selected. Taken together in fully customized portfolios – and combined with our financial planning, tax expertise and industry-leading consolidated investment reporting – we offer exactly the right blend of resources to help our clients successfully manage their financial affairs.

### Q Why are you considered a leading wealth advisory firm?

Silvercrest considers integrity, objectivity and transparency to be of prime importance when evaluating and selecting a wealth advisor. The values of these criteria have never been more critical than in today's investing environment. The advisor's history of performance and overriding investment philosophy should also receive careful consideration when evaluating a potential manager. Particular attention should be paid to the firm's results during down-market periods, since these are often indicative of the success of the company's overall strategy. Finally, a wealth advisor should be able to deliver a comprehensive and customized portfolio management solution along with competitive performance and an extraordinarily high level of service.

### Q How has your firm adapted during the recent economic downturn, and what new opportunities have developed for your firm and your clients?

By investing only in fundamentally good businesses with strong balance sheets and free cash flows, as well as a history of earnings growth with excellent prospects for future growth, Silvercrest has been able to weather the recent economic turbulence with relative stability. Silvercrest has adapted to current market conditions by exercising a great deal of prudence with regard to asset allocation.

#### AT A GLANCE

- Ownership of firm: 74% owned by employee principals; 26% owned by Vulcan Capital (Paul Allen)
- Office location(s): New York City, NY; Boston, MA; Charlottesville, VA
- Number of employees: 81
- Number of client families: 347
- Assets under advisement: \$10.4 Billion
- Average client net worth: \$30 Million
- Relationship manager/client ratio: 25:1

DIRECTORY OF MULTIFAMILY OFFICE  
AND WEALTH ADVISORY FIRMS

2011



# Threshold Group

PO BOX 2358, GIG HARBOR, WA 98335  
253.851.4300 • WWW.THRESHOLDGROUP.COM

**Q Briefly describe your firm, its offerings and its mission statement.**

Threshold Group is an independent, family-owned office serving the financial, legacy and wealth management needs of a select number of families and private foundations throughout the United States. Our service offerings combine deep institutional-quality investment capabilities with an intimate service experience and a longstanding culture of integrity, transparency and community.

Our Mission: To serve as the independent wealth advisor for families that want to make a difference for generations to come.

**Q Describe your investment strategy and how it might be unique.**

Threshold enjoys valuable access to the manager research and capital markets insights of Russell Investments – a global investment enterprise created and eventually sold by our founders, the Russell family. Russell research is top-ranked\* by professional money managers who fall under its rigorous scrutiny. This access provides valuable groundwork and global reach for Threshold's investment analysts and advisors. Threshold refines and adds to this research to create goals-driven investment strategies for our own private, taxable and tax-exempt clients. It's a worthy combination of institutional knowledge, specialized expertise and customized, goals-based portfolio construction.

**Q What do you consider to be the most important factors when evaluating a wealth advisor or MFO?**

Each client and advisor must work together to build an honest, forthright and trusting relationship from the outset. Threshold helps prospective clients conduct a thoughtful process of discovery, whether our capabilities are the winning solution or not. We carefully evaluate potential clients at the same time they are evaluating our people and services. This mutual discovery and

assessment starts immediately and allows one of two outcomes: a head start toward a stronger, deeper relationship; or early acknowledgement that a strong fit is not likely. Either way, the client and advisor have helped one another immensely.

**Q How has your firm adapted during the recent economic downturn, and what new opportunities have developed for your firm and your clients?**

Economic headwinds have led to:

- Increased client communications regarding long-term strategy and intermediate-term investment opportunities;
- An honest look at liquidity rather than just risk and return as meaningful investment factors in asset allocation;
- A focus on how best to sustain a family's legacy or mission amid lower market returns;
- An increasing need to educate future generations regarding the challenges and opportunities associated with wealth.

Economic challenges have prompted more frequent, more honest dialogue concerning the most vital goals for families and their private foundations. Today everyone is wide awake and paying attention to how decisions are made and whether results are aligned to realistic priorities.

## AT A GLANCE

- Office location(s): Gig Harbor, WA; Philadelphia, PA; Seattle, WA; Portland, OR
- Number of employees: 45
- Number of client families: 20+ full-service clients
- Assets under advisement: \$2.9 billion
- Average client net worth: \$80-120 million
- Relationship manager/client ratio: 1 RM per 3-4 full-service clients

\* May, 2011 — A Fundfire survey of professional investment managers cited Russell Investments for top scores in manager due diligence.



## DIRECTORY OF MULTIFAMILY OFFICE AND WEALTH ADVISORY FIRMS

2011



# WILMINGTON TRUST

1100 NORTH MARKET STREET, WILMINGTON, DE 19890  
800.456.9361 • WWW.WILMINGTONTRUST.COM

### Q Briefly describe your firm, its offerings and its mission statement.

Wilmington Trust was founded by members of the du Pont family in 1903. Since then, we have been in the business of building long-term relationships with clients, many of which have lasted for generations.

The Wealth Advisory Services group advises families with complex needs on how to grow, protect, and transfer their wealth. We take a comprehensive approach to helping our clients achieve their goals through a variety of personal trust, wealth and estate planning, asset management, and family office solutions. Wealth Advisory Services has clients in all 50 states and 32 other countries and is widely recognized as a premier wealth management organization by clients, trust and estate attorneys, tax, and other advisors for the excellence, expertise, and experience of our staff.

### Q Describe your investment strategy and how it might be unique.

At Wilmington Trust, our investment approach is forward-looking. Our Capital Markets Forecast, prepared at least annually, includes economic and financial market projections over a seven-year horizon. A central objective of our forecasting process is to assess market valuations. On at least a monthly basis, we consider both valuations and trends in investor preferences, or market momentum. We may shift allocations in an effort to reduce risk or increase returns. We offer a large platform of proprietary and third-party investment solutions, enabling great flexibility in the implementation of our asset allocation recommendations.

### Q What do you consider to be the most important factors when evaluating a wealth advisor or MFO?

Objective advice that always puts the client's needs first, a

broad range of customized and sophisticated services, an integrated approach to the delivery of services, and the ability to make decisions today with their impact on future generations in mind. A firm's solutions should also clearly align with the broad range of complex needs that affluent families have today.

### Q How has your firm adapted during the recent economic downturn, and what new opportunities have developed for your firm and your clients?

The recent economic downturn has caused a "flight to quality" for many people, whose focus is more sharply on timeless factors such as risk management, trustworthiness, and integrity. In this environment, clients are increasingly turning to Wilmington Trust as a tried-and-true provider of wealth management services. Our clients have appreciated our proactive communication with them in these challenging times and as a result our client retention rates remain high.

#### AT A GLANCE

- Ownership of firm: Wilmington Trust Wealth Advisory Services is part of M&T Bank Corporation
- Office location(s): California, Connecticut, Delaware, Florida, Georgia, Maryland, Massachusetts, New Jersey, New York, Pennsylvania
- Number of employees: 560
- Number of client families: NA
- Assets under management: \$80 billion
- Average client net worth: \$15 million
- Relationship manager/client ratio: 1:20