



SILVERCREST
ASSET MANAGEMENT GROUP

*An independent investment advisory and
financial services firm created to provide traditional and
alternative asset management and focused family office services
to wealthy families and select institutional investors.*

SILVERCREST ASSET MANAGEMENT

- About Silvercrest
 - An independent, employee-owned, full-service wealth management boutique
 - 90 employees
 - Located in New York City and Charlottesville, Virginia
- Client relationships
 - \$9.6 billion in assets under advisement*
 - Relationship Size: \$5 - \$700 million
 - 92% of asset under management for individuals and families
- Managing Directors
 - 25+ years average experience
 - Career wealth management professionals
- Wealth and investment management
 - Proprietary equity and fixed income management
 - Complementary outsourced investment management
 - Traditional and innovative alternative investments
- Estate and wealth planning
 - Investment management integrated with tax planning
 - State-of-the-art consolidated reporting
 - Estate planning and family office services
- Silvercrest's distinguishing characteristics
 - Partnership structure: Silvercrest principals own the firm
 - Wholly independent and conflict free
 - Only source of compensation is our advice

* Including assets under management at Silvercrest subsidiaries and assets under administration.



SILVERCREST WEALTH PLANNING & SERVICES

- Philanthropic, estate and wealth planning
 - Coordinate and integrate wealth planning with investment strategies
 - Minimize income, gift and estate taxes
 - Maximize value of assets transferred

- Tax planning and preparation
 - Income tax planning, preparation and payment
 - Estimated tax monitoring and payroll taxes
 - Fiduciary tax return, planning, preparation and payment

- Specialized investment matters
 - Family partnerships
 - Foundations
 - Art collections

- Charitable gift planning
 - Family Foundations
 - Charitable Remainder Trusts
 - Charitable Lead Trusts

- Family office services
 - Financial statement preparation, accounting, bill paying and record keeping
 - Funds transfers; advise on bank loans and loan payments
 - Medical insurance claim preparation and administration
 - Property and casualty insurance review
 - Concierge services



SILVERCREST'S GUIDING PRINCIPLES

- We will create, build and maintain an environment that encourages innovation and original thought and apply this fresh thinking to the needs of our clients and firm.
- We will attract, motivate and retain unusually talented and ambitious professionals who share a passion for the investment business and an antipathy for corporate bureaucracy and office politics.
- We will conduct ourselves in all our dealings as highly ethical, responsible and competent professionals who always place our clients' financial interests ahead of our own.
- We will encourage and nurture an entrepreneurial, collegial and action-oriented business culture in which “fun” is inevitable and decisions are generally consensual.

