

# Understanding Key Brand Elements:

Critical Brand Elements	Pathstone
Brand, put simply, is the most important <b>difference</b> that a company stands for	One firm stands above the rest in combining innovative programs and solutions built on the timeless family office tradition of trust and service. That firm is Pathstone: <i>The Modern Family Office</i> <sup>TM</sup>
Not just any brand, the objective is to create a <b>selling</b> brand	Pathstone is built <i>for clients</i> , powered by innovation and smart in a way that matters.
<b>Facts</b> make the difference...not claims	Innovation has led to exceptional solutions and advice for our clients, that we believe, gives them the best chance to meet their objectives  We innovate at every opportunity for both preservation and growth. We innovate for greater efficiencies and better fee structures in order to pass the savings on to our clients. We innovate for enhanced after-tax results. We innovate to provide timely integrated information for our clients to make informed decisions. We innovate to give clients deeper insights and greater opportunities to align their financial endeavors with their responsibilities as multigenerational stewards of wealth. <i>But we never experiment or speculate</i> in any way that would put our clients at greater risk. This is the essence of the <i>modern</i> family office.
If possible, create your own <b>unique category</b>	<i>The Modern Family Office</i>
If possible and positive ...build on existing good <b>historical brand</b>	Shortened name to Pathstone...keeping historical industry and client recognition
Brand story explains who, what, how and establishes <b>dominant selling idea</b>	See attached Brand Story
Look and feel	Consistent with brand elements – refined logo, launch transitional website (as we develop new one behind the scenes), update collateral and start comprehensive roll out

## Pathstone:

<b>Positioning Statement</b>	<i>Pathstone stands above the rest as...</i> <b>The Modern Family Office</b> That's because Pathstone has created a unique culture of innovation built on the timeless foundation of family office service. The result is the ultimate client experience in an era of constant change.
<b>Unique Own-able Category</b>	The Modern Family Office
<b>Tagline</b>	Built for Clients, Powered by Innovation & Smart in a Way That Matters
<b>Market Segments</b>	Families Family Offices Select Institutions



# PATHSTONE

The Modern Family Office

**Welcome to**

**Pathstone, *The Modern Family Office*<sup>TM</sup>**

*Built for Clients. Powered by Innovation.*

The world's wealthiest, most sophisticated clients choose one solution over any other when it comes to managing their wealth. They move from the large institutional financial firms to the exclusive services of a family office, a model that is designed from the ground-up to serve clients above all else. The family office structure promotes trust, transparency, customization, and alignment of talent. Considered the pinnacle of wealth management, family offices provide the most personalized service on the widest range of integrated solutions.

But in the age accelerating technology and changing global markets, clients are presented with a complex new set of opportunities and threats. Family offices must now become equally adept at leveraging the tools of change and innovation to provide their clients with best practices, timely solutions and the information needed to make informed decisions.

Lip-service to innovation is not enough. Without modern systems, broad experience and cultures built to master the modern era, many conventional family offices default to customary, traditional standards for their core services, resulting in missed opportunities and lackluster results.

Today, one firm stands above the rest in combining innovative programs and solutions with the timeless family office tradition of service and trust. That firm is *Pathstone: The Modern Family Office*.

## **Creating the Modern Family Office.**

With a legacy of independent thinking and ownership dating back to 1991, Pathstone has grown into an industry leader and innovator offering its services to families, family offices and select institutions. In recent years, as the era of constant change became the new normal, the founders knew that their unique mix of *talent, technology and technique* needed even greater scale to keep ahead of the times. The goal was to be big where it counts and small where it matters. The team developed and successfully executed on a strategic growth plan resulting in a true modern family office advising over 300 clients and \$12 billion in assets.

## **Powered by Innovation: What It Means at Pathstone.**

“Innovation” in the financial realm causes concern for many clients for good reason. We’ve all seen the results of financial engineering, experimentation and speculation at banks and brokerage houses seeking their own gain.

At Pathstone, we innovate for the opposite reasons: we innovate solely for our clients’ benefit. We innovate at every opportunity for both preservation and growth. We innovate for greater efficiencies and better fee structures in order to pass the savings on to our clients. We innovate for enhanced after-tax results. We innovate to provide timely integrated information for our clients to make informed decisions. We innovate to give clients deeper insights and greater opportunities to align their financial endeavors with their responsibilities as multigenerational stewards. *But we never experiment or speculate* in any way that would put our clients at greater risk. This is the essence of the modern family office.