



Welcome to

Pathstone, *The Modern Family Office*[™]

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.