

Location: Cipriani 42nd Street, New York
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Tuesday 7 February 2012

Private Asset Management (PAM) Awards returns for 2012 to recognize and reward those who have successfully serviced high-net-worth individuals in an increasingly complex economic environment and have proved true ability in all seasons. The Awards are organised by PAM magazine.

Over the past year, has your business demonstrated:

- Consistent financial progress?
- Growth in client numbers, internal hires and geographic expansion?
- Excellence in client satisfaction?
- Innovative new products/ services?

Then you should enter the PAM Awards 2012! Please note that entries for the 2012 Awards are now closed.

2012 SHORTLIST

Category

Shortlist

Best private wealth manager - over \$5bn

BBR Partners
Brown Advisory
First Republic Bank
Legg Mason Investment Counsel
Merrill Lynch
Tiedemann Wealth Management

Best private wealth manager - under \$5bn

CitizensTrust
HAGIN Investment Management
Massey Quick
Silver Bridge
Spruce Private Investors
Truepoint

Best private wealth manager - performance - over \$5bn

Arden Asset Management
Atlantic Trust
Brown Advisory
Brown Brothers Harriman
Capital Group Private Client Services
Citi Private Bank

Best private wealth manager - performance - under \$5bn

Accretive Capital Partners
Silver Bridge
Spruce Private Investors
Truepoint

Best private wealth manager - client service - over \$5bn

Aspiriant
Atlantic Trust
Brown Brothers Harriman
Legg Mason Investment Counsel
Merrill Lynch
Tiedemann Wealth Management

Best private wealth manager - client service - under \$5bn

HAGIN Investment Management
HPM Partners
Lowenhaupt Global Advisors
Silver Bridge
Spruce Private Investors
Truepoint

Best multi-family office - overall - over \$2.5bn

Atlantic Trust
Ballentine Partners
Citi Private Bank
GenSpring Family Offices
Harris myCFO
Marcum

Best multi-family office - overall - under \$2.5bn

BNR Partners
Gleneagles Group
Highmount Capital
HPM Partners
Lowenhaupt Global Advisors
Pathstone Family Office
Silver Bridge Family Office Partners

Best multi-family office - client service - over \$2.5bn

Aspiriant
Citi Private Bank
GenSpring Family Offices
Harris myCFO
Marcum

Best multi-family office - client service - under \$2.5bn

Highmount Capital
HPM Partners
Lowenhaupt Global Advisors
Pathstone Family Office
Pepper International
Silver Bridge Family Office Partners
Vogel Consulting

Best single family office service provider

DeWitt Stern Group
Fidelity Family Office Services
Lowenhaupt Global Advisors
Pershing Advisor Solutions, a BNY Mellon company
Private Client Resources
Teresa Leigh Household Risk Management

Best multi-family office service provider

Archway Technology Partners
Ascent Private Capital Management of U.S. Bank
Fidelity Family Office Services
Marcum
Pershing Advisor Solutions, a BNY Mellon company
Rothstein Kass

Best family office service provider - client service

DeWitt Stern Group
Fidelity Family Office Services
Lowenhaupt Global Advisors
Pershing Advisor Solutions, a BNY Mellon company
Rothstein Kass
Teresa Leigh Household Risk Management

Private banking - north america

Bernstein Global Wealth Management
Boston Private Bank & Trust Company
Brown Brothers Harriman
Citi Private Bank
First Republic Bank
U.S. Trust

Private banking - client service

Bernstein Global Wealth Management
Boston Private Bank & Trust Company
Brown Brothers Harriman
Citi Private Bank
First Republic Bank
U.S. Trust

Private banking - innovation

Bernstein Global Wealth Management
Brown Brothers Harriman
Citi Private Bank
Private Client Resources
U.S. Trust

Private client investment platform - client service

Bernstein Global Wealth Management
Citi Private Bank
InvestEdge
Merrill Lynch
Spruce Private Investors

Private client investment platform - performance	Atlantic Trust Citi Private Bank InvestEdge Spruce Private Investors
Private client investment platform - innovation	Ascent Private Capital Management of U.S. Bank Bernstein Global Wealth Management Dynasty Financial Partners InvestEdge Spruce Private Investors
Best newcomer - asset management	Accretive Capital Partners Capital Innovations Clear Harbor Asset Management HPM Partners
Best newcomer - advisory consulting	Alliance Security Council & The Alliance Report Ascent Private Capital Management of U.S. Bank Berman Capital Advisors Dynasty Financial Partners Frank Crystal & Company Ten Capital Advisors
Best trustee services	Atlantic Trust Beacon Trust Company Brown Brothers Harriman CitizensTrust Fiduciary Trust Company International
Best law firm - private client	Handler Thayer, Attorneys and Counselors at Law Holland & Knight

Kozusko Harris Duncan
Nixon Peabody
Withers Bergman

Best law firm - client service

Handler Thayer, Attorneys and Counselors at Law
Holland & Knight
Kozusko Harris Duncan
Nixon Peabody
Withers Bergman

Best overall law firm

Handler Thayer, Attorneys and Counselors at Law
Holland & Knight
Kozusko Harris Duncan
Nixon Peabody
Withers Bergman

Outstanding contribution

Dynasty Financial Partners
Frank Crystal & Company
Harris myCFO
Institute for Wealth Management Standards
Rothstein Kass
WorldClinic

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JUDGING CRITERIA

The PAM Awards are designed for investment professionals and wealth advisors, operating within the private asset management industry, who have proved themselves over the course of 2011. The judging process, using an independent

panel, made-up of industry experts, will be based on a mixture of qualitative and quantitative performance indicators. Successful candidates must demonstrate:

- 1 Financial progress: candidates must be able to demonstrate a performance track-record over the course of the last twelve months
- 2 Growth: client numbers, internal hires and geographic expansion
- 3 Client satisfaction: provide evidence of client satisfaction, including anecdotes and direct client statements
- 4 Product innovation: details of new services and products launched over the course of 2011.

All applicants are encouraged not to exceed 500 words per question. Although the answers will form the basis of the adjudication process, the PAM judges will also consider additional supporting documentation, including case studies.

Questions

- 1 Please provide a summary of your business model, including countries of operation, client numbers and services/products offered.
- 2 Please provide a summary of how your business has grown in 2011 – including customer numbers and size/growth of client assets
- 3 How have you developed your chosen category's offering in 2011? Can you provide examples of product innovation, performance (if necessary, please forward excel sheets with performance figures) and how your company has dealt with the challenges (ex: new regulation) of the last year.
- 4 Please provide any additional detail in support of your application (max 500 words)

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