BNY MELLON
WEALTH MANAGEMENT

Family Office Group

Commitment to Family Offices

The Family Office Group at BNY Mellon Wealth Management has been dedicated exclusively to serving the needs of family offices for over 45 years. Backed by the deep resources of BNY Mellon, our experienced professionals provide access to solutions and strategic insights to help our clients grow and preserve wealth across generations. This attention to detail and unwavering commitment to our clients has resulted in industry-leading client satisfaction and helped us become one of the nation's largest family office service providers.

How We Can Help

Over the years we have expanded and enhanced our resources, expertise, and capabilities to serve the unique needs of family offices across the globe. Our capabilities include:

- **Global Custody & Consolidated Reporting**: As a leading global asset service provider, we understand the complexities of tracking, reporting and analyzing investments across managers, asset classes and legal structures, and have invested in state-of-the-art technology that provides online access to industry-leading performance and risk analytics tools.
- **Fiduciary Expertise**: BNY Mellon is a national leader in fiduciary services with more than 200 years of experience as corporate trustee. Our fiduciary experts work alongside the family and their legal and tax advisors to ensure that family trusts are administered and distributed as intended by the grantor.
- **Specialized Investment Products**: We provide a comprehensive range of investment strategies and services delivered though our investment boutiques, as well as comprehensive wealth management solutions and specific asset class strategies constructed around each client's unique liquidity, cash flow, tax, risk and return requirements.
- **Personalized Private Banking**: With one of the largest and most stable balance sheets in the industry, we provide the credit solutions family offices need. Our experienced private bankers provide highly personalized service and sophisticated financing strategies.
- **Private Peer Networking**: We facilitate opportunities for family offices to meet and network with peers through client conferences, sponsorship of industry organizations and confidential introductions to other family offices.

To learn more about the Family Office Group, please contact:

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