

# STANHOPE CAPITAL GROUP Company Profile

April 2021

**Independence**

**Alignment**

**Innovation**



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# Stanhope Capital Group

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Stanhope Capital Group provides asset management and advisory services to private clients, charities and institutions around the world. After the merger with US based FWM – owner of Forbes Family Trust, LGL and Optima – Stanhope Capital Group is now one of the world's largest independent global wealth management and advisory firms.

- Stanhope Capital Group oversees close to USD 24 billion on behalf of significant private clients, institutions, charities and endowments across the world
- Our aim is to provide clients with the best available investment expertise in a conflict-free environment where the interests of all parties are properly aligned
- We offer a highly bespoke service seeking to address the clients' specific objectives, constraints and risk-tolerance
- Today, we represent over 250 families and 50 institutions

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## Global outlook and expertise across asset classes

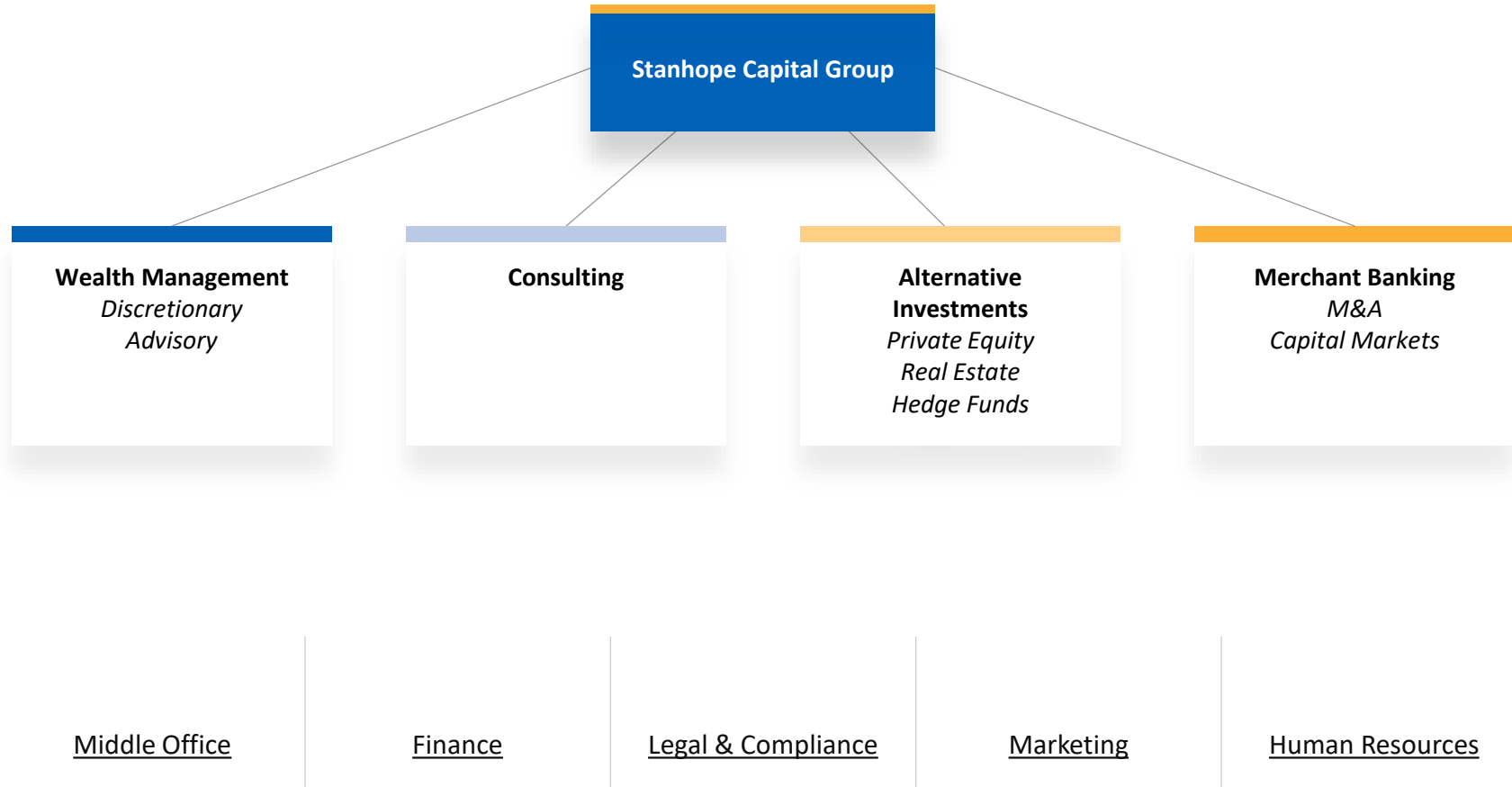
Signatory of:



- Our **Wealth Management** team operates on an open architecture basis. The teams are led by highly experienced professionals with strong track records investing across asset classes
- Our **Consulting** team advises on investment strategy, manager review and selection and provides on-going investment advice
- Our **Alternative Investments** team is active in private equity, real estate, private credit and hedge funds
- Our **Merchant Banking** team assists clients on mergers, acquisitions, sales, restructurings, debt and equity financings
- We strive to operate in a socially and environmentally responsible manner, whilst on the investment front we are committed to allocating our clients' capital responsibly
- Our team of around 140 people operates from London, Geneva, Paris, New York, Philadelphia and Palm Beach. The capital of the firm is controlled by its Partners

# Organisation – four complementary divisions

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# The Stanhope Capital difference

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- Our objective is to protect and increase the wealth of our clients by providing superior risk-adjusted returns throughout cycles
- We add value in two areas: asset allocation (strategic and tactical) and fund selection
- We work with our clients either on a discretionary or advisory basis

## Objectivity

- Highly customised asset allocation implemented with the objective of selecting the best managers/ funds wherever they are
- We are not tied to in-house products
- No commissions on third party products

## Alignment of interests

- Partners and employees invest their personal wealth alongside clients
- Our fees are fair and transparent and all clients benefit from the same quality of service
- Access to the same managers is assured with capacity shared pro-rata between clients

## Innovation

- Highly experienced investment team with prior long-term records managing equity, bond and alternative assets portfolios in some of the world's most reputable asset management firms
- Platform also benefits from the experience / access of its clients
- Investment Committee and Advisory Board members are active contributors to idea generation

# Senior Management, Board and Advisory Council

## EXECUTIVE COMMITTEE



**Daniel Pinto**  
Founder, Group Chief Executive  
& Chairman of the Board



**Ivo Coulson**  
Partner, Head of Portfolio Management &  
Member of the Board



**Nigel Spray**  
Partner, Co-head of Merchant Banking



**Keith Bloomfield**  
Partner, Chief Executive USA  
& Vice Chairman of the Board



**Nicole Curti**  
Partner, Group COO & Head of Switzerland



**Alice Ryder**  
Partner, Head of Consulting



**Jonathan Bell**  
Partner, Chief Investment Officer  
& Vice Chairman of the Board



**Andrew Mehalko**  
Partner, Co-chief Investment Officer USA



**John Baron**  
Partner, Chief Financial Officer

## BOARD OF STANHOPE CAPITAL GROUP



**Daniel Pinto**  
Founder, Group Chief Executive  
& Chairman of the Board



**Shafik Gabr**  
Chairman & CEO, ARTOC Group



**Fleur Pellerin**  
Founding Partner, Korelya Capital



**Keith Bloomfield**  
Partner, Chief Executive USA  
& Vice Chairman of the Board



**Keyu Jin**  
Professor of economics, LSE



**Ely Michel Ruimy**  
Chairman of AERIUM Group



**Jonathan Bell**  
Partner, Chief Investment Officer  
& Vice Chairman of the Board



**Thomas H. Lee**  
Chairman, Lee Equity Partners



**Bonnie Steiner**  
Partner, Stonehage Fleming



**Ivo Coulson**  
Partner, Head of Portfolio Management &  
Member of the Board



**James Lieber**  
Founding Partner, Lieber Strategies

## ADVISORY COUNCIL



**Lord Browne of Madingley**  
Chairman of the Advisory Council  
Former CEO of BP Group



**Sir Martin Sorrell**  
Executive Chairman & founder, S4 Capital



**Jacques Attali**  
Founder & head of A&A

# Legal and regulatory information – legal disclaimer

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