

STANHOPE CAPITAL GROUP Company Profile

October 2021

Independence

Alignment

Innovation



Table of Contents

1. Stanhope Capital Group	p. 3
2. Stanhope Capital divisions	p. 4
3. The Stanhope Capital difference	p. 5
4. Senior Management & Advisory Committees	p. 6

Stanhope Capital Group

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 approximately USD 28 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

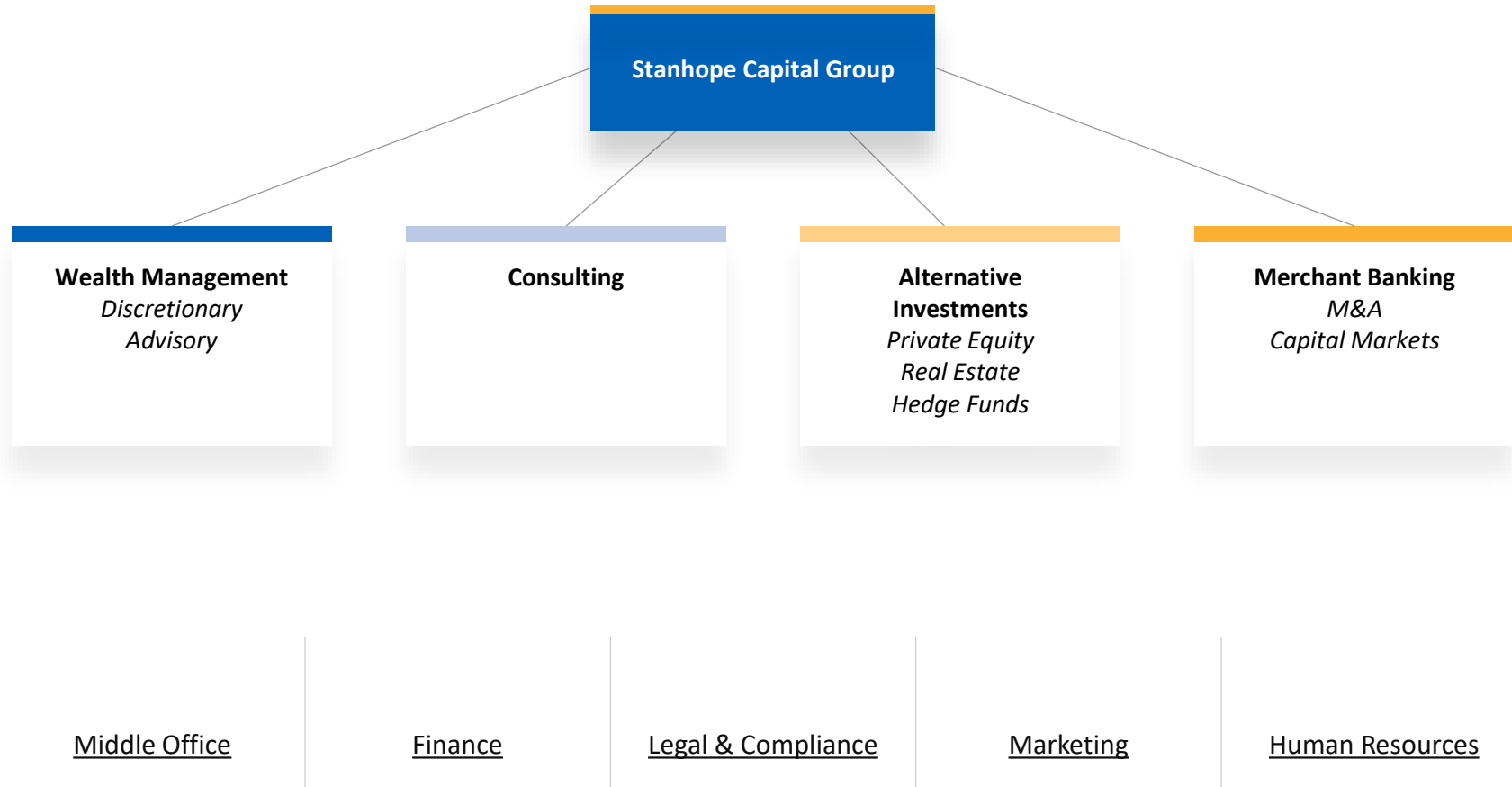
Global outlook and expertise across asset classes

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



The Stanhope Capital difference

- 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

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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