

# STANHOPE CAPITAL GROUP Company Profile

March 2022

**Independence**

**Alignment**

**Innovation**



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# Stanhope Capital Group snapshot

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One of the largest and only truly global independent wealth managers

2

\$27bn AUM with an exceptional +30% annualized growth rate since inception

3

Broad suite of offerings to complement core Wealth Management business, incl. Alternative Investments<sup>1</sup> and Merchant Banking

4

'Best of all worlds' value proposition, combining the resources and global reach of a large, global organization with the ethos and alignment of a truly independent advisor

\$27bn

Assets under management

300

Private & institutional clients

140

Employees

6

Offices globally

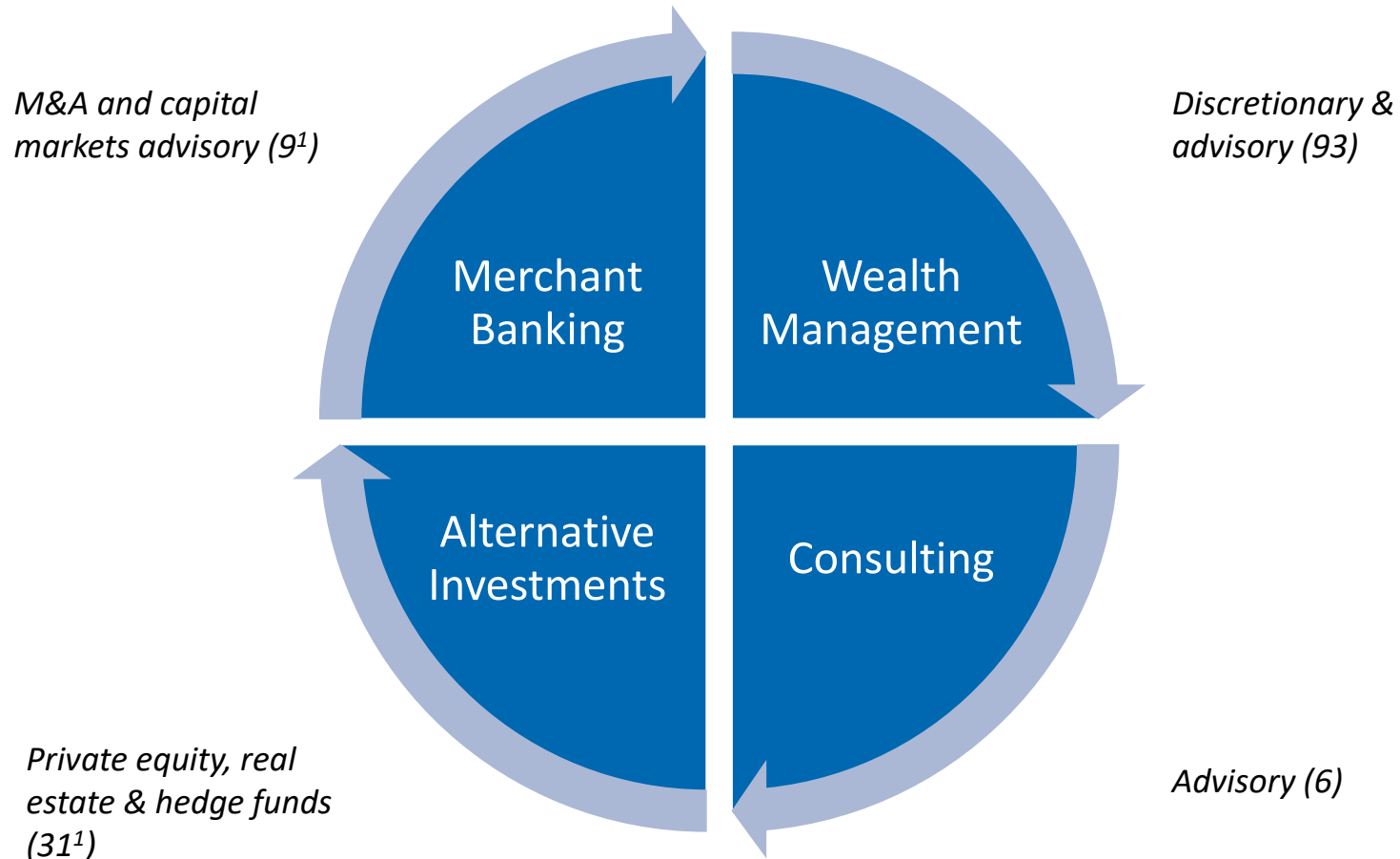
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Lines of business

Notes:

1. Incl. private equity, real estate and hedge funds

# Four complementary Divisions



*(# of team members)*

Note:

1. Including dedicated senior advisors

# 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
- 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. We are signatories of the UN Principles for Responsible Investment (UNPRI).

## 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 Council members are active contributors to idea generation

# Senior Management

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## EXECUTIVE COMMITTEE

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**Daniel Pinto**

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

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**Keith Bloomfield**

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

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**Jonathan Bell**

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

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**Ivo Coulson**

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

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**Nicole Curti**

*Partner, Group COO & Head of Switzerland*

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**Andrew Mehalko**

*Partner, Co-chief Investment Officer USA*

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**Nigel Spray**

*Partner, Co-head of Merchant Banking*

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**Alice Ryder**

*Partner, Head of Consulting*

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**James C McGrath**

*Partner, Co-chief Investment Officer USA*

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**Noam Enk**

*Partner, Corporate Development*

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**Chris Shelley**

*Partner, Group Chief Financial Officer*

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# Board of Directors and Advisory Council

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## BOARD OF STANHOPE CAPITAL GROUP

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**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 Ensof Capital*



**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

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**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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