

Stanhope Capital Group

Investment Management | Consulting | Private Investments | Merchant Banking

Company Profile

July 2024

Objectivity

Expertise

Alignment

Responsibility

1. Who we are



Stanhope Capital Group snapshot

- 1** Established, independently owned global wealth manager 
- 2** Four complementary lines of business: Wealth Management; Alternative Investments (Private Equity, Real Estate, Hedge Funds); Consulting and Merchant Banking 
- 3** Best of all worlds: resources and International reach of a large global organisation with the ethos and alignment of a truly objective partner. 
- 4** Responsible investing at the core 



2004
Founded



8
Offices

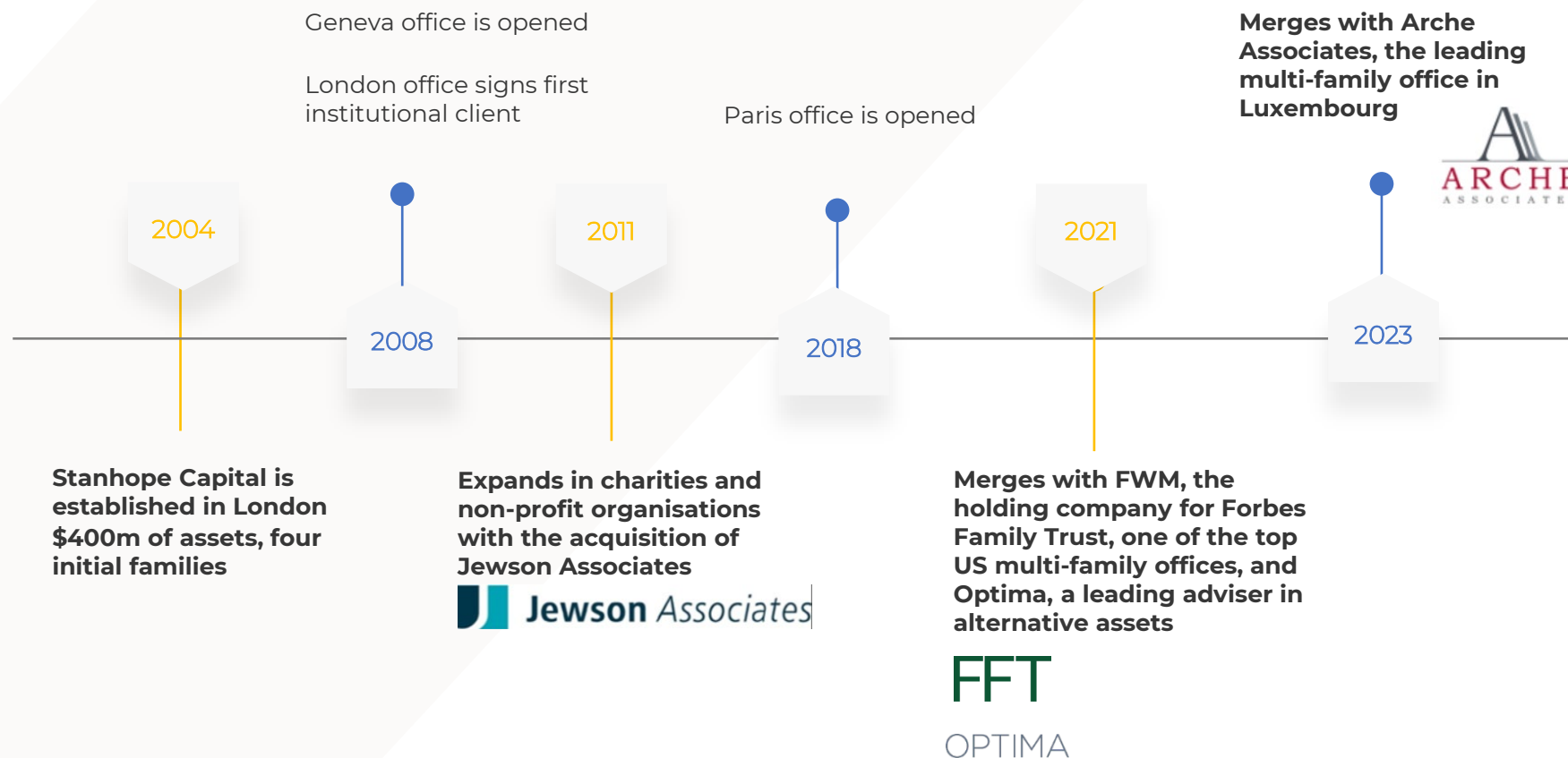
540
Private &
institutional clients

\$43bn
Assets under
supervision

160
Employees

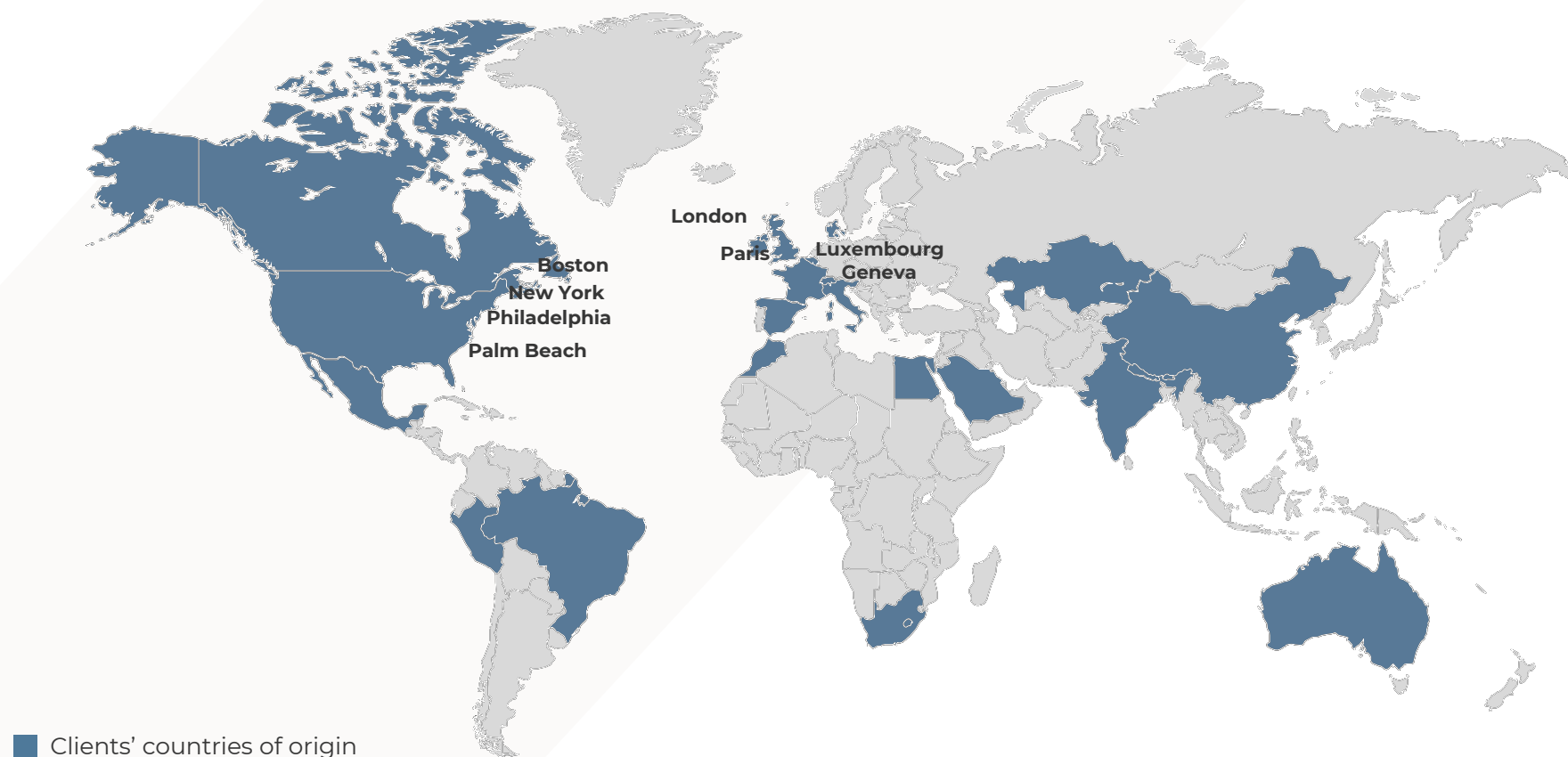
Stanhope Capital Group's corporate evolution

In 20 years, the firm has gone from being a European focused boutique with \$400m assets under supervision to becoming one of the leading global independent wealth management groups with \$43bn AuS



Extensive global footprint

With teams across 8 offices in Europe and North America, we offer a full range of services to clients in 25 countries around the world



OUR CLIENTS



\$43bn assets
under supervision

540 clients including
60 institutions

25 countries of origin

What does Stanhope do?

Stanhope provides a full suite of investment services to institutions, corporations and families

Core services

Investment Management



- Fully customisable portfolios to clients' needs
- Full integration of public and private markets

Alternatives Investments



- Access vehicles for private markets/ illiquid investments
- Real estate
- Hedge funds

Consulting



- Advice on asset allocation & manager selection
- Bespoke research projects

Merchant banking



- Act as trusted adviser
- Direct investment opportunities
- Corporate finance
- Capital raising – debt and equity

Ancillary services



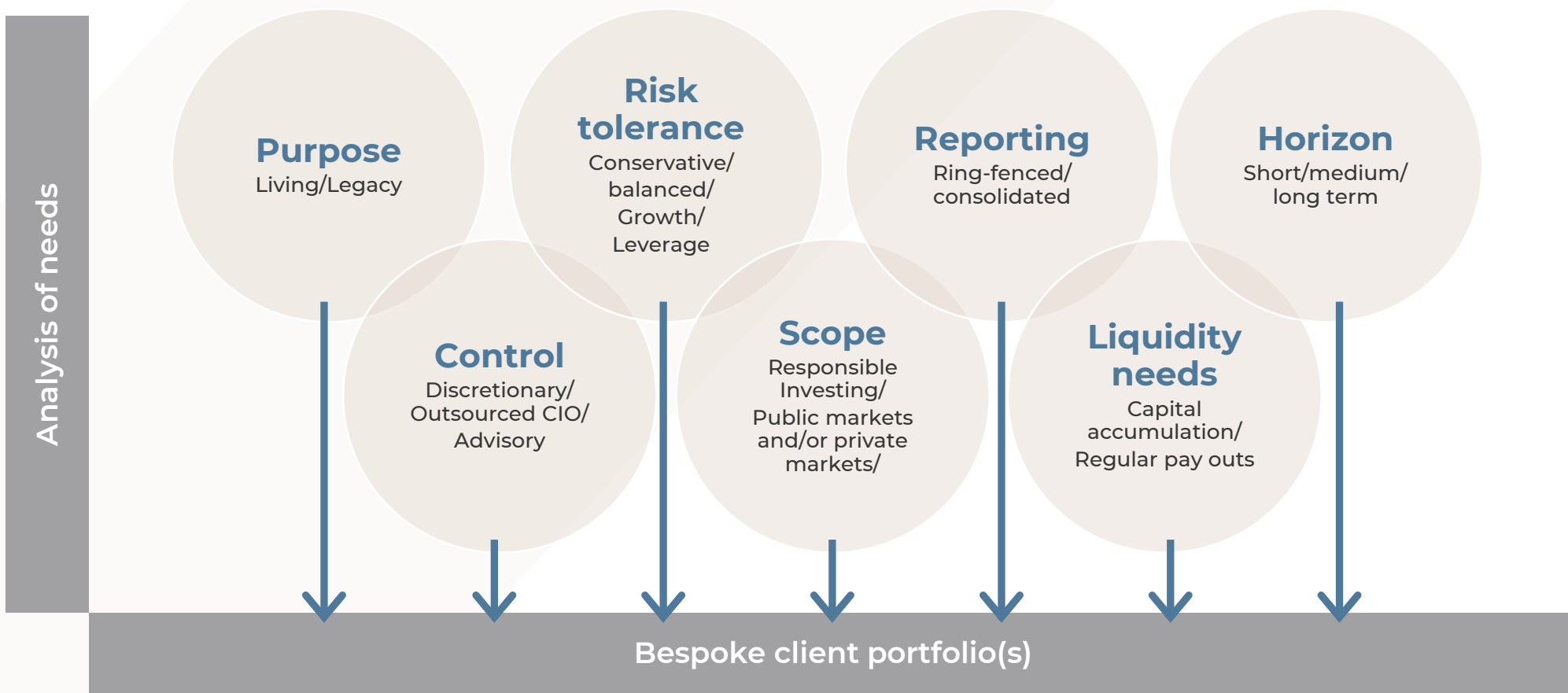
- Advise on Investment office set-up
- Coordination with trustees/ lawyers/ custodians
- Consolidated reporting and oversight of external portfolios
- Developing investment policies
- Custodian and jurisdictional search
- Sourcing of leverage, as needed

Our flexible service

Stanhope's clients typically have substantial investable assets and complex needs

We start with a blank sheet of paper to identify our clients' needs and to design a service and portfolio around them

'One size fits all' portfolio models do not adequately address these needs



Responsible Investment

Stanhope Capital Group is committed to responsible investment, and to this end are signatories of the UN Principles for Responsible Investment (UNPRI).

Committed to allocating our clients' capital responsibly but are not prescriptive in our approach.

Work with clients to identify the best strategy to meet their non-financial and financial goals.

Recognise that responsible investment can be approached in different ways and ensure investments are managed in a way that is consistent with individual investors' beliefs and values.

Thorough operational and investment due diligence processes which all investments must undergo allow us to screen managers before inclusion in portfolios

Routinely engage with managers to encourage a responsible investment approach.

Signatory of:



Stanhope Capital Group's commitments



Operational Setup



Investors today face a host of challenges



How can Stanhope help

Addressing the complex opportunities and challenges presented by today's investment markets

Establishing framework

- Appropriate structure(s) to protect your assets
- Multi-custodian search and selection
- Strategy and Objectives
- Risk tolerance
- Liquidity /distributions needs
- Customised strategic asset allocation and portfolio construction
- Flexibility to adapt

Implementation

- Discretionary or advisory mandates
- Diversified by asset class and region
- Open architecture / "best of breed" approach
- In-house Fund due diligence and monitoring
- Ongoing monitoring and rebalancing of portfolio to maintain alignment with agreed policy.

Ancillary services

- Consolidated reporting and risk oversight
- Monitoring and benchmarking of third-party managers
- Fee negotiation on funds, custody, brokerage and currency trades
- Preparation of family meetings
- Coordination of specialist advisors (tax, legal, etc.)
- Arrangement of asset financing

Why us: The Stanhope Capital difference

Highly personalized, unbiased and flexible client engagement

Objectivity

- Independently owned
- Custom-made solutions
- In-house investment due diligence
- In-house operational due diligence

Alignment of interests

- Fees are transparent, and all clients benefit from our negotiated pricing
- Responsibility at the core of our firm and our investment process
- Partners invest their personal wealth alongside clients

Expertise

- Highly resourced and experienced investment team with long-term records
- Investment Committee and Advisory Council members are active contributors and protect against group think

Our investment philosophy

Responsible, disciplined and consistent



Executive Committee

EXECUTIVE COMMITTEE



Daniel Pinto

Founder, Group Chief Executive & Chairman of the Board



Anne Bejui-Thivolet

Partner, Head of Stanhope Capital France



Jonathan Bell

Partner, Chief Investment Officer & Vice Chairman of the Board



Keith Bloomfield

Partner, Chief Executive USA & Vice Chairman of the Board



Ivo Coulson

Partner, Head of Portfolio Management & Member of the Board



Andrew Mehalko

Partner, Chief Investment Officer USA



Frédéric Otto

Partner, Chief Executive Luxembourg & Vice Chairman of the Board



Rudy Paulet

Managing Partner Luxembourg (Family Office)



Franck Payrar

Managing Partner Luxembourg (Wealth Management)



Alice Ryder

Partner, Head of Consulting



Chris Shelley

Partner, Group Chief Financial Officer



Nigel Spray

Partner, Co-head of Merchant Banking

Board of Directors

BOARD OF STANHOPE CAPITAL GROUP



Daniel Pinto

Founder, Group Chief Executive & Chairman of the Board



Jonathan Bell

Partner, Chief Investment Officer & Vice Chairman of the Board



Keith Bloomfield

Partner, Chief Executive USA & Vice Chairman of the Board



Ivo Coulson

Partner, Head of Portfolio Management & Member of the Board



Frédéric Otto

Partner, Chief Executive Luxembourg & Vice Chairman of the Board



Lord Browne of Madingley

*Chairman, BeyondNetZero
Formerly CEO of BP*



John Copeland

Managing & Founding Partner, Wealth Partners Capital Group



Corinne Evens

Chairman, Evens Group



Shafik Gabr

Chairman & CEO, ARTOC Group



Keyu Jin

Professor of Economics, LSE



Ely Michel Ruimy

Chairman, Ensof Capital



Bonnie Steiner

Formerly Partner at Stonehage Fleming



William J Tyne, Jr.

Formerly Managing Director and Head of Alternative Assets at Bessemer Trust

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France

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The different risk profiles can be adapted according to the allocation ranges by asset class agreed in the investment objectives defined with the client.

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