

## FORBES FAMILY TRUST WINS PRIVATE ASSET MANAGEMENT MAGAZINE AWARD

BEST PRIVATE WEALTH MANAGER – CLIENT SERVICE – UNDER \$5BN

Forbes Family Trust is proud to announce that the firm has won a Private Asset Management Award for the second year in the row. The firm won “Best Private Wealth Manager – Client Service – Under \$5BN” for 2015 and was granted the “Best Multi Family Office – Under \$2.5BN” award in 2014.

The Private Asset Management (PAM) Awards recognize the top investment professionals and wealth advisors operating within the private asset management industry. The winners are those who have successfully serviced high-net-worth individuals in an increasingly complex economic environment.

The firm received the award at the 2015 PAM Award ceremony on February 2nd, 2015 in New York City.



Forbes Family Trust (FFT) is a multi-family office based in New York and Philadelphia whose mission is to help wealthy individuals and families preserve and grow their assets. FFT provides unparalleled service, responsiveness, and intellectual rigor to our family clients, managing approximately \$2.6BN for several dozen clients located in the US and abroad.

FFT delivers customized investment solutions. Our relationship with our clients is comprehensive, enabling us to design a plan for the long term, while recognizing that being tactically nimble can help to manage risk. By developing a personal risk profile and identifying wealth management goals, we structure a plan to guide the investment process. We formulate a suitable asset allocation, research and select appropriate investment vehicles, tactically adjust portfolios as opportunities emerge, rebalance as necessary, monitor, and clearly report the results.

FFT identifies opportunities in all asset classes. We use proprietary tools and software to add an additional layer of return and risk quantification when considering potential allocations for our families. Using our own internal software, AlphaBeta, and our leading portfolio accounting systems, we have the ability to report on alternative assets and private investments in great detail. Additionally, we can report on marquee art, individual real estate, antiques, and other tangible assets, alongside partnership interests and clients' publicly-traded securities. As a comprehensive family office, FFT has the experience to provide a variety of lifestyle solutions to successful individuals and families.

## **PAM AWARD CRITERIA**

The PAM Awards are designed for top investment professionals, wealth advisors, legal firms, consultants and other key service providers operating within the private asset management industry, who have proved themselves over the course of the last year.

The judging process, using an independent panel made up of industry experts, is based on a mixture of qualitative and quantitative performance indicators. P. Scott Gregorchuk is a judge for the PAM Awards, generally, but is not permitted to judge any category in which FFT Wealth Management, LLC (“FFT”) is a candidate for the award.

When FFT applies to win a PAM Award, along with all other candidates, it must demonstrate:

- Financial progress – Candidates must be able to demonstrate a performance track-record over the course of the last twelve months;
- Growth – client numbers, internal hires and geographic expansion;
- Client satisfaction – provide evidence of client satisfaction, including evidence of exceptional service and direct client statements
- Product innovation – details of new services and products launched over the course of the prior twelve months

Although client satisfaction statements are included in the criteria for consideration, the client satisfaction statements may not be representative of any one client’s experience because the statements provided reflect the experiences of only some of the FFT clients. It is not known whether clients who did not provide statements approve or disapprove of the advisory services provided to them.