Your Family Office
Powered by Pitcairn

EXPANDING THE REALM
OF WHAT'S POSSIBLE

PITCAIRN®

Every Single Family Office Has Its Own Story. What's Yours?

As prosperous families grow, so does the complexity of their wealth and family dynamics. Families often turn to a family office structure to exercise greater control and privacy over their future, establishing a way to pass wealth and ideals to the next generation.

Yet maintaining a family office can put a strain on family relationships and resources. The very structures designed to provide clarity and control can create confusion, complexity, and cost. What was meant to be a tool to empower future generations devolves into an increasing burden for current family members and advisors.

"The success of a family office requires staying on track with investments, tax strategies, and estate planning, as well as keeping multiple family members involved. It's a monumental responsibility, so the importance of surrounding yourself with advisors you trust can't be overstated."

– FOUNDER AND CEO, TRANSPORTATION BUSINESS

Has Your Family Office Reached an Inflection Point?

Every new generation adds individual family members and households, along with a greater diversity of opinions, objectives, and expectations.

Emerging generations may want more control and separate management of their assets. Meanwhile, entrepreneurship, strategic estate planning, and increased philanthropy create a web of related entities — partnerships, businesses, trusts, and foundations — with corresponding administrative burdens. Strained resources may hinder your single family office's (SFO) delivery of quality service.

If your SFO has reached a crossroads, Pitcairn can help you find a more purposeful evolution that can achieve better outcomes for your family.

Rethinking Your Single Family Office

Here are some issues that might spur a SFO to reimagine the way it operates.

1

GROWING NUMBER OF HOUSEHOLDS WITHIN THE FAMILY

Resources and staffing can be spread thin and become cost prohibitive when serving multiple generations.

2

FAMILY OFFICE LEADER IS RETIRING

A departing family office leader can create a huge loss in institutional knowledge and cause management instability.

3

INCREASING NEED FOR BETTER TECHNOLOGY AND CYBERSECURITY

SFOs generally don't have the in-house capabilities and latest technical infrastructure to ensure that financial data and family privacy are secure.

4

FAMILY MEMBERS GROWING APART

Maintaining family cohesion becomes harder as differing opinions and changing priorities emerge.

Setting the Standard for Client Experience

Partnership is the cornerstone of Pitcairn's work with families. Partnerships are custom-designed to address each family's needs.

Our partnerships are built on several core pillars.

TRUSTED EXPERT TEAMS

Each client family relationship is overseen by a dedicated Relationship Manager backed by a comprehensive team of specialists and experts that span the full spectrum of financial and family dynamics, including investing, tax, trust and estate planning, accounting and administration, governance, family learning, and more.

CUTTING-EDGE TECHNOLOGY

PRISM™ (Pitcairn Reporting and Information Security Management) represents the state-of-the art in integrated family office support with innovative views and insights into a family's full financial picture, offering next-level data security, control, and simplified wealth administration.

FIDUCIARY TRANSPARENCY

Our 100% open-architecture investment platform and transparent pricing structure guarantee complete alignment with the goals and objectives of the families we serve.

GENERATIONAL INCLUSION

Our custom approach extends wealth horizons by incorporating all relevant family voices and giving members of the next generation the tools, vocabulary, and commitment to be an active part of our partnership and the future of their families.

Pitcairn's Wealth Momentum® Model

Wealth Momentum® is Pitcairn's integrated, multispecialty family office service model. It is the first to balance the totality of both family and financial dynamics to drive better outcomes, today, and for generations.

HOW IT HELPS FAMILIES

- Delivers excellent financial results
- Reduces family and financial friction
- Improves your family's cohesion
- Supports multiple generations for success

"Wealth Momentum® is the total picture of a family's wealth. It integrates financial and family dynamics into a plan that keeps a family's momentum going well into the future."

– ANDREW L. BUSSER, President Family Office

Wealth Momentum®

Financial Integration Services

We've spent years refining our Financial Practice Areas to balance the full spectrum of tailored financial strategies and advice, supported by an open-architecture investment platform designed to build financial resilience and drive the best outcomes for generations to come.

INVESTMENTS
Proven, conflict-free, product-agnostic investment platform rooted in enduring tenets, built on nearly a century of success.

TRUSTS & ESTATES
Signature estate planning approaches, advice and fiduciary services that result in clear plans and consistency across generations.

TAX
From innovative tax strategies to compliance and filings, we take care of everything so you can keep more of what you make.

FINANCIAL LITERACY
Comprehensive and customized programs that prepare family members of all ages to be great stewards of family wealth.

CFO SERVICES
Best-in-class tools and techniques that ensure an accurate and timely reflection of your family's total wealth.

RISK MANAGEMENT
From insuring people and property to secure recordkeeping, we provide tailored advice focused on minimizing your risk.

Wealth Momentum®

An Investment Model Solely Focused on Our Families

Pitcairn's investment approach is conflict free and fully aligned with your family's desire to sustain multi-generational wealth.

Supported by decades of experience and vast market expertise, we follow ***five core tenets*** of successful multigenerational family investing.

1

EQUITIES FOR LONG-TERM GROWTH

Global equity markets have a natural tendency to appreciate over time and protect against inflation.

2

STICK TO THE STRATEGY

Historical data clearly show that it is better to stay committed to a long-term plan than to try to time markets.

3

VALUATIONS MATTER

We monitor global markets to identify when relative values get out of line and provide tactical opportunities to take advantage of the return to normalcy to boost performance.

4

ACTIVE/PASSIVE HYBRID

We use a blend of active and passive managers within client portfolios to capture positive returns while reducing risk and expenses.

5

TAX OPTIMIZATION PROGRAM

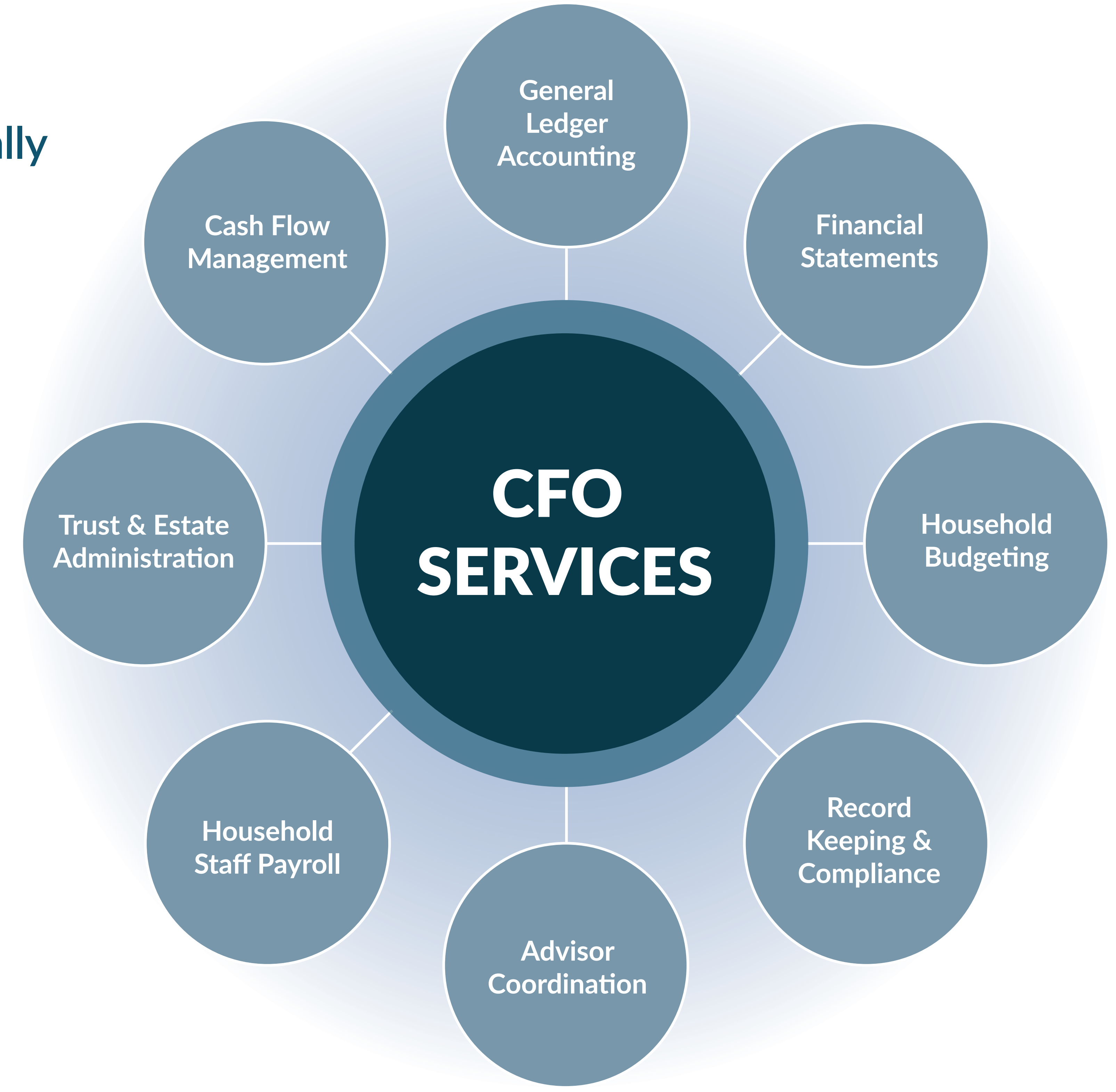
Our pioneering tax management has enhanced our US equity portfolio performance by more than 1% per year.

"Our 100 years of family investment experience and conflict-free investment platform gives our clients a proven advantage."

– H.F. "RICK" PITCAIRN, II, Chief Global Strategist

CFO Services: Achieve Sustainable Results with an Integrated Solution

Pitcairn's CFO Services are specifically designed to work with your current family office operation. Our CFO Services team can work independently or in conjunction with your existing single family office to provide the complete support you need.



Wealth Momentum®

Family Dynamics Services

Family relationships are a constantly changing, living, breathing dynamic that can have profound and lasting impact, both good and bad, on the trajectory and wellbeing of a family's wealth momentum.

SUCCESSION LEADERSHIP

Proven and practical strategies to prepare the emerging generation of family leaders to be successful stewards of their wealth.

PHILANTHROPY

Comprehensive and customized approaches that clarify your intentions and maximize your impact.

DECISION-MAKING & GOVERNANCE

Proven structures, systems, and support to help your family navigate new challenges and decisions as they grow and evolve.

LEGACY & CULTURE

Signature sessions, tools, and techniques that help foster more meaningful and productive family conversations and meetings.

LIFE STAGE MANAGEMENT

Customized support to ensure families are surrounded by the right people and armed with the right information.

VALUES & MISSION

Experiential frameworks designed to transform your beliefs, stories, and traditions into family principles that guide priorities for generations to come.

Leadership and Learning for the Modern Family

The Gen7 Project® is Pitcairn's own thought leadership and learning lab created to empower the world's leading families to develop a deep personal understanding of their wealth.

Its mission is to inspire modern families of wealth to share knowledge in ways that help them recognize and resolve the unspoken cultural and generational disconnects that erode the promise and fulfillment of their legacies. Its name pays homage to the ancient leadership principle that every decision should benefit descendants seven generations into the future.

The Gen7 Project is focused on proprietary research, dynamic, innovative learning opportunities, and peer networking for rising generations.

gen7 PROJECT®

KEY INITIATIVES

PERSONALIZED FAMILY LEARNING PROGRAMS

Customized education fostering meaningful conversations, developing how families honor great legacies, and preparing emerging generations for the future. From family retreats to one-on-one mentoring, each program addresses the unique values and needs of multi-generational families.

SIGNATURE EVENTS & EXPERIENCES

In-person and virtual gatherings exploring topics unique and relevant to wealthy families and their advisors.

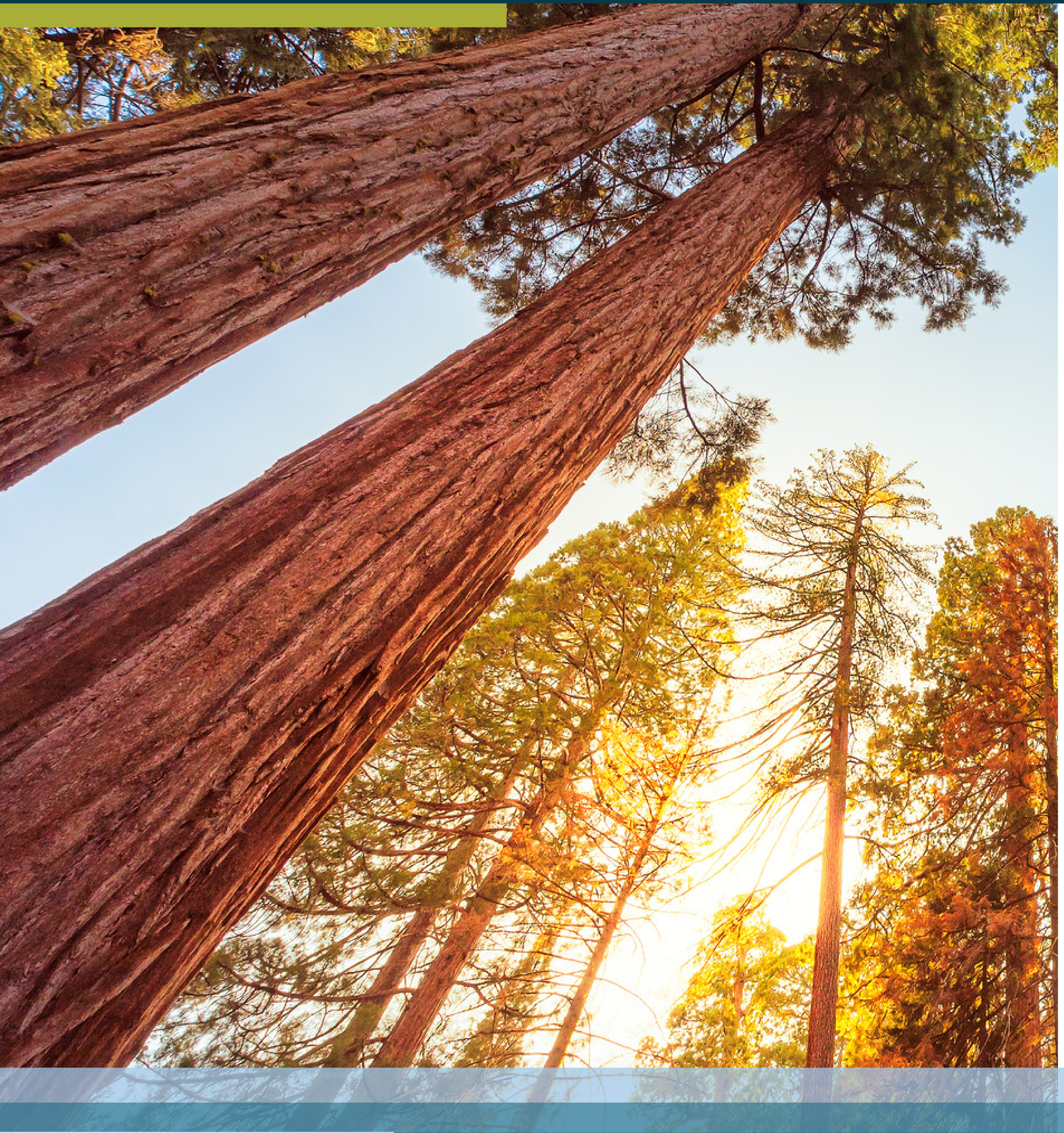
RESEARCH, INSIGHTS, & THOUGHT LEADERSHIP

Proprietary studies and published reports offering a deep dive into the facts, trends, and nuances of cross-generational family communication and learning styles.

60% OF WEALTHY FAMILY LEADERS
say a breakdown in trust and communication erodes wealth transition to heirs.

"The Gen7 Project is inspiring families to share knowledge that elevates their true potential, as well as helping them recognize and resolve the generational issues that erode legacies."

– AMY HART CLYNE, Chief Knowledge & Learning Officer



PITCAIRN

A Century in the Making

For the last century, we've dedicated ourselves to empowering families like yours to prosper and endure. Like many of the leading families we serve, we have been through our own wealth journey.

Pitcairn was founded in 1923 by the family of industrial visionary, John Pitcairn, of the famed Pittsburgh Plate Glass Company. Now, in our sixth generation, we've refined our investment approach to reflect a truly multi-generational perspective with a 100% open-architecture platform.

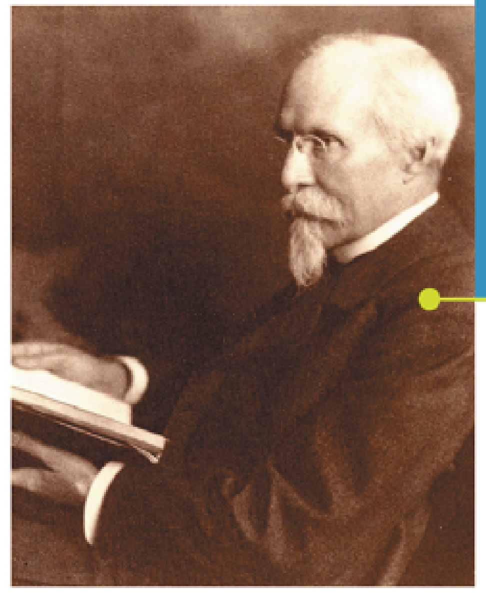
We've invested in leading technology advancements to ensure all of our work with our client families is insightful, reliable, intuitive, and secure.

After a century serving wealthy families and family offices, we know the potentials and pitfalls that come with building a legacy. We know because countless families have entrusted us with solving for their future. We've built our entire firm around better outcomes not just today, but for generations to come.

"Over the last 100 years, our work as a family office has been defined by partnership. The families we choose to work with each have unique needs, and we've built our organization around solving those needs now and for generations to come."

– LESLIE C. VOTH, Chairman, Chief Executive Officer & President

A Rich History



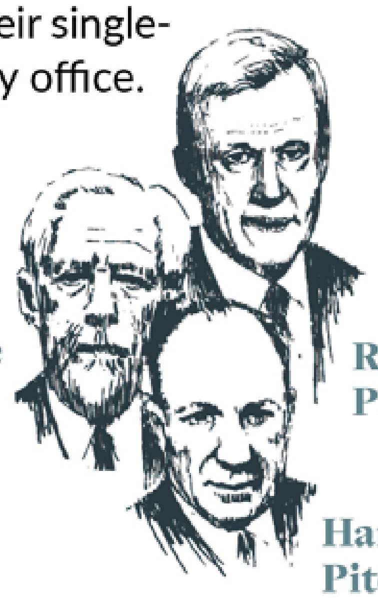
John Pitcairn

1883

John Pitcairn (G1) co-founds Pittsburgh Plate Glass Company.

1923

Pitcairn's three sons (G2) establish Pitcairn Company as their single-family office.



Theodore Pitcairn

Raymond Pitcairn

Harold Pitcairn

1950s–80s

Leadership passes on to G3, then G4.

1987

Pitcairn Trust Company is formed as a family-owned multi-family office.

2008

Pitcairn moves to 100% open-architecture investment platform. Introduces proprietary tax overlay program.

2017

Pitcairn unveils Wealth Momentum®, an experience-based family office service model.

PITCAIRN WEALTH MOMENTUM

2019

Pitcairn leadership passes from G4 to first, non-family Chairman.

Leslie C. Voth

2020

gen7 PROJECT

Pitcairn introduces the Gen7Project®, an innovative thought leadership and learning lab.

2022

Pitcairn serves 125 multi-generational families including 22 single-family offices.

2023

100th anniversary of the founding of the Pitcairn family office.

100 EST. 1923 PITCAIRN CENTENNIAL ANNIVERSARY

Pitcairn At A Glance

- 125 client families and single family offices
- $7 billion in advised assets
- Full suite of family office services
- Private trust company
- Experts located in Philadelphia, New York, Washington, DC, and Palm Beach

Our Culture

Investing in People and Purpose

It’s not just our client families who thrive on positive momentum. Our entire organization is built around giving employees the resources and knowledge they need to achieve success for our clients, for each other, and most importantly, for themselves.

OUR VALUES & GUIDING PRINCIPLES

CURIOSITY:
Constantly exploring, learning, and turning new ideas into best practices

COLLABORATIVE:
Sharing everything we’ve learned and soaking up the expertise of others

INNOVATIVE:
Staying one step ahead of market trends and fast-changing technologies

INTEGRITY:
Providing a client experience that is clear, honest, and consistent

EXCELLENCE:
Delivering better outcomes for the families who put their trust in us

“When I tell friends I work for a family office, they don’t always know what that means. I tell them — it means helping the world’s most affluent families not just protect and grow their wealth, but find meaningful ways for the family as individuals and as a whole to thrive.”

– LAURA KREMP, Relationship Engagement Manager

PITCAIRN®

A True Family Office

Let's explore a new path to reimagine your family office.

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