PRIVATE WEALTH

Your Needs Are Our Priorities

BOSTON | ATLANTA | CHARLOTTE | CHICAGO | DETROIT | LAS VEGAS | PORTLAND | SAN FRANCISCO

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As an independent and trusted investment adviser for **over 30 years**, we truly understand the challenges & complexities of managing wealth.

A LITTLE ABOUT US

We are passionate about serving our clients.

Founded in 1986, we are known for incisive expertise and exceptional service. Our independence ensures our impartiality, aligning our interests with the success of our clients. Our longevity is a testament to the loyalty of our clients and the quality of service we provide.

Our consultants are among the most qualified and experienced in the industry - thought leaders whose insights are grounded in NEPC's research-driven ethos. Our views are generated by a research group of over 50 professionals, one of the most significant research commitments in the industry. We offer investment solutions and strategies in traditional and alternative investments, customized to meet the needs of each individual client.

THIS IS ABOUT YOU

Your needs are our priorities.

You deserve an adviser who understands your needs and objectives are unique, just like you are. Your investment adviser's success should be defined by your success. You should be part of a culture that believes there is no substitute for hard work and has the resources to help you achieve your goals. You should partner with a firm that is a thought leader and is always striving to do better. That is why NEPC is the place for you. We understand that wealth needs to be preserved, spent and grown - often, all at the same time. We understand that wealth is both a privilege and a responsibility. Wealth has to be fluid to satisfy short-term demands, yet resilient to meet long-term commitments. It should carry a sense of empowerment for the next generation, but not entitlement. It should liberate, not restrict. It is these tenets we keep in mind when we are working with you to structure a wealth strategy to help you meet your current and future goals and objectives.

All our recommendations are backed by the **strength** of NEPC's research and consulting groups

NEPC offers a deep reserve of intellectual capital on topics covering asset allocation, market and manager research, risk management and investment execution. We will define and create a plan for you, based solely on your requirements, taking into account spending needs, generational planning, tax strategy and philanthropic priorities. We will partner with you to help manage and coordinate a holistic wealth management program and help you with other life encounters along the way, such as wealth education for younger generations or guiding charitable activities.

As a discerning investor, responsible for the stewardship of a portfolio of significant wealth, you understand the importance of selecting the **right** partner.

SO, WHAT SETS US APART?

Independence. Objectivity. Research Driven. Results Oriented.

Unlike many firms catering to private investors, we have structured our firm to put your interests first. Our recommendations are driven only by our commitment to you. We do not manage any products and we do not accept any form of compensation other than the consulting fees paid by our clients. This ensures that our interests are fully aligned with yours, allowing us to focus on what we do best - serve you.

Unlike smaller firms, NEPC has the size and scale necessary to navigate today's complex investing environment. With over 250 professionals, we have the breadth and depth of resources required to service your relationship. We have dedicated specialists in roles ranging from research and analytics to operations and reporting. They work in tandem with our consultants to bring investment ideas from all over the world to your doorstep.

Unlike larger firms, you won't get lost in the crowd at NEPC. We believe clients are best served by experts in the field who are focused on you; as a result, we have purposefully structured our firm as a collection of practice groups. The private wealth team at NEPC consists of deeply committed and talented individuals with extensive experience in not only investing, but also the issues that are unique to private wealth.

OUR APPROACH

You are unique. So are we.

Be Proactive. Like you, we're proactive. We're always looking for a better idea, but skeptical of the next new thing. We're willing to deviate from conventional thinking in pursuit of the best solutions. When you work with us, you'll hear from us. We'll bring you new ideas, fresh thinking, different approaches – all with an eye towards helping you achieve your goals.

Go Beyond. We believe the best investors think beyond investments. Estate planning, tax strategy, philanthropic goals, family dynamics - these, and many other factors, are considered in every decision or recommendation we make.

Get Results. We know results are important to you. They are important to us too, and the strong performance of our client portfolios over time is evidence of our success in this area. We will evaluate your existing holdings and we'll give you our assessment - and then respect your decision and monitor your assets for you.

NEPC can be engaged as a non-discretionary advisory consultant, or as a discretionary outsourced manager of your assets.

OUR PEOPLE & PROCESS

We make it simple for you.

Our private wealth team is one of the most experienced in the industry. Our client-centric team members possess significant wealth management experience, bringing to the table an average of 20 years' experience. In addition to benefiting from their acumen, you will have access to the collective intellectual capital of NEPC.

As a starting point, we will seek to understand your needs and objectives and learn what is important to you and your family. Our dedicated investment professionals will then develop a plan that is tailored to you, partnering with your network of existing relationships - ranging from estate planners to tax consultants or other advisors - to implement a holistic wealth management strategy designed to help you achieve your goals.

Discretionary vs. Non-Discretionary

Some of our clients are very hands-on. They may be astute investors themselves or have strong capabilities within their family office environment. Often, these clients are looking for a way to leverage and complement their existing capabilities and find in NEPC a true partnership of equals. In relationships of this type, we fit our capabilities around yours, allowing you to direct our services where they provide the most benefit.

Other clients are busy, focused on other pursuits or have expertise in areas outside investing. These clients are often looking for a trusted advisor who can step into the role of an Outsourced Chief Investment Officer (OCIO). In relationships of this type, we work together to establish goals and objectives, risk tolerance and general parameters, and then we implement the decisions on your behalf.

Many clients fall somewhere between these two ends of the spectrum and that is why we believe our service offering should not be an "either/or" option. Instead, we operate on a continuum, allowing you to decide which approach is right for you, both in terms of decision-making and implementation.

LET US SERVE YOU

- ✓ Discretionary and non-discretionary investment consulting relationships
- ✓ Investment policy development
- ✓ Strategic and tactical asset allocation
- ✓ Investment manager due diligence and monitoring
- ✓ Performance reporting
- ✓ Impact investing
- ✓ Family education
- ✓ Asset allocation strategies
- ✓ Strategies for concentrated positions
- ✓ Custodial searches
- ✓ Specialized projects

LEARN MORE

With dedicated consultants, research and operational professionals in eight offices across the United States, all sharing their best thinking in pursuit of excellence, we are uniquely qualified to serve your family. We are fully committed to providing best-in-class service and results for our clients. Our performance speaks for itself - ask us for more information or request a meeting to learn how we can help you.

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