



Wally Head and Kim Kamin Take Leadership Roles in The Ultra-High Net Worth Institute

CHICAGO, IL, November 12, 2020 – Wally Head, Gresham’s Vice Chairman, has been an active member of the Ultra-High Net Worth Institute’s Advisory Board since it was launched in early 2019. Kim Kamin, Gresham’s Chief Wealth Strategist, was recently appointed as Domain Chair for the Estate Planning and Legal content that is curated or developed by this newly established educational non-profit Institute. Wally and Kim also are members of the Institute’s Leaders Council, and Gresham is a firm member of the UHNW Institute.

The UHNW Institute was established in response to the overarching confusion, lack of transparency and absence of unbiased education regarding wealth management business models that are available to UHNW families and their advisors. The Institute’s Mission is to:

- Offer an intellectual understanding and organization of the family wealth field;
- Educate UHNW families and family offices as they navigate the wealth management industry;
- Provide insights and resources to advisors and wealth management firms as they strive to better serve UHNW and family office clients; and
- Promote best practices, professional development and sustainable, positive change in the wealth management industry.

One of the early accomplishments of the UHNW Institute is its development of The Ten Domains of Family Wealth, which define the landscape families inhabit when they are wealthy. An explanation of this architecture and content of each of the ten domains is included on the UHNW Institute’s website at www.uhnwinstitut.org/think-tank.

About Gresham

Gresham Partners is an independent wealth management firm that has been providing investment and wealth planning services to a select group of ultra-high-net-worth individuals and families since 1997. Owned entirely by our senior professionals, we manage or advise on over \$6 billion* for about 105 families* located nationally.

We focus on keeping our interests aligned with our clients’ interests by avoiding trust-eroding conflicts that are inherent in many firms. We attract discriminating clients – professional investors, business owners and C-Suite executives – with the highest standards who expect exceptional investment performance and client service.

Our unconventional investment approach has protected and grown our clients’ capital over time by using difficult-to-access managers that are located globally, invest in a full range of asset classes and are unaffiliated with Gresham. We integrate our investment services with comprehensive wealth planning, holistic reporting and other family office services that are designed to contribute to the financial and emotional well-being of our clients.

*Approximate AUM and client families as of 12/31/19.