



FOR IMMEDIATE RELEASE

Gresham Partners Wins 2020 *Best Wealth Planning – Other Organizations* Award from *Family Wealth Report*

CHICAGO – March 18, 2020 – Gresham Partners, a fully independent firm that provides family office services and manages over \$6 billion for about 105 select families and family offices located nationally, has been named *Best Wealth Planning – Other Organizations* firm by an independent panel of experts for the 7th Family Wealth Report Awards. This is the third award bestowed on Gresham by *Family Wealth Reports* in the past four years, with Gresham being named *Best Multi-Family Office Between \$5 Billion and \$15 Billion AUM/AUA* in 2019 and *Best Multi-Family Office Over \$3 Billion AUM/AUA* in 2017.

Members of the independent panel of experts that selected Gresham are experienced advisors/consultants to ultra-high-net-worth families who reviewed submissions provided by a number of firms in this category and narrowed the group down to eight finalists. The panel, which was assembled by *Family Wealth Report*, based its decision on responses submitted by these firms to a series of questions regarding their firms and the services they provide their clients.

“It is an honor for our wealth planning expertise to be recognized by an independent panel of industry experts ” said Ted Neild, Gresham’s president and chief investment officer. “Once again this year, we are pleased to receive an award determined by knowledgeable people in the ultra-high-net-worth space based on their assessment of the quality of the services we provide our clients, and not merely on the amount of assets we manage.”

Commenting on the Family Wealth Report Awards generally, Stephen Harris, CEO of ClearView Financial Media, which publishes *Family Wealth Report*, observed “These awards were judged solely on the basis of entrants’ submissions and their response to a number of specific questions, which had to be answered focusing on the client experience, not quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards recognize the very best operators in the private client industry, with ‘independence’, ‘integrity’ and ‘genuine insight’ the watchwords of the judging process - such that the awards truly reflect excellence in wealth management.”

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.