

THE RICHEST FAMILY OFFICES

KEY

FIRMS WITH GREATEST YEAR-OVER-YEAR GROWTH

RANK ACCORDING TO YOY GROWTH

*Assets under advisement as of Dec. 31.
**Includes transfers from within the bank.
NA = not available. Source: Bloomberg

	FIRM NAME > MAIN OFFICE LOCATION(S)	AUA, IN BILLIONS*	YOY % CHANGE	NUMBER OF FAMILIES
1	HSBC Private Wealth Solutions > HONG KONG	\$137.3	11	340
2	Northern Trust > CHICAGO	112.0	23	3,457 9
3	Bessemer Trust > NEW YORK	77.9	25	>2,200 8
4	BNY Mellon Wealth Management > NEW YORK	76.0	18	400
5	Pictet > GENEVA	57.3	0	>50
6	UBS Global Family Office > ZURICH, LONDON, SINGAPORE, HONG KONG, NEW YORK	47.5	27**	NA 5
7	CTC Consulting Harris myCFO (BMO Financial) > CHICAGO	35.0	6	312
8	Abbot Downing (Wells Fargo) > MINNEAPOLIS	32.2	5	594
9	U.S. Trust (Bank of America) > NEW YORK	31.1	5	162
10	Wilmington Trust (M&T Bank) > WILMINGTON, DELAWARE	24.6	-23	436
11	Hawthorn (PNC Financial) > PHILADELPHIA	23.1	8	>580
◇	Rockefeller Financial > NEW YORK	23.1	10	259
13	Glenmede > PHILADELPHIA	21.4	7	211
14	Atlantic Trust (Invesco) > ATLANTA	19.5	9	2,296
15	GenSpring Family Offices (affiliate of SunTrust Banks) > JUPITER, FLORIDA	15.8	-5	442
16	Veritable > NEWTOWN SQUARE, PENNSYLVANIA	11.3	10	203
17	Silvercrest Asset Management > NEW YORK	10.6	4	365
18	Oxford Financial Group > CARMEL, INDIANA	10.4	3	232
19	Whittier Trust > SOUTH PASADENA, CALIFORNIA	8.9	16	290
20	Commerce Family Office > ST. LOUIS	8.8	35	79 4
21	ATAG Private & Corporate Services > BASEL, SWITZERLAND	8.0	8	50
22	Tiedemann Wealth Management > NEW YORK	7.5	15	96
23	TAG Associates > NEW YORK	7.0	3	103
24	Spudy & Co. Family Office > HAMBURG	6.6	27	80 5
25	Bedrock > GE VA	6.0	20	70 10
26	BBR Partners > NEW YORK	5.8	14	75
27	1875 Finance > GENEVA	5.1	0	5
28	Bollard Group > BOSTON	5.0	0	8
29	FS Finance Suisse > ZURICH	4.8	19	11
◇	Laird Norton Wealth Management > SEATTLE	4.8	7	416
◇	myCIO Wealth Partners > PHILADELPHIA	4.8	6	529
32	Ascent Private Capital Management (U.S. Bancorp) > MINNEAPOLIS	4.4	96	60 2
◇	Ballentine Partners > WALTHAM, MASSACHUSETTS	4.4	10	73
◇	Constellation Wealth Advisors > NEW YORK	4.4	5	150
35	Athena Capital Advisors > LINCOLN, MASSACHUSETTS	4.3	27	21 5
◇	Baker Street Advisors > SAN FRANCISCO	4.3	19	40
37	Synovus Family Asset Management > COLUMBUS, GEORGIA	4.1	6	35
38	Federal Street Advisors > BOSTON	4.0	5	27
39	Clarfled Wealth Strategists & Financial Confidantes > TARRYTOWN, NEW YORK	3.9	7	350
◇	Gresham Partners > CHICAGO	3.9	5	67
◇	Presidio Group > SAN FRANCISCO	3.9	7	125
42	Aspiriant > LOS ANGELES	3.7	6	74
43	Tolleson Wealth Management > DALLAS	3.5	46	105 3
44	Marcuard Family Office > ZURICH	3.4	-12	42
◇	St. Louis Trust > ST. LOUIS	3.4	16	40
46	Signature > NORFOLK, VIRGINIA	2.9	-18	56
47	SandAire > LONDON	2.7	-1	15
◇	Vogel Consulting > BROOKFIELD, WISCONSIN	2.7	7	23
49	CV Advisors > MIAMI	2.5	100	41 1
◇	Matter Family Office > ST. LOUIS	2.5	7	147

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