





## DISCOVER NEWEDGE FAMILY OFFICE SOLUTIONS

### Where Precision Meets Purpose

For ultra wealthy families, wealth management isn't just about returns; it's about alignment. Your wealth should reflect your goals, embody your values, and sustain your legacy for generations.

At NewEdge Family Office, we align every decision, every opportunity, and every strategy with your family's unique vision and values through research-driven investment management and comprehensive family office services.

### Why Choose NewEdge Family Office?

The best in every category rarely lives under one roof.

That's why NewEdge Family Office is built differently—by curating leading specialists across investment management, estate strategy, tax optimization, and administration, and integrating them into a cohesive experience.

We're not building a single solution for everyone. Instead, we research, curate, and help implement solutions for what's most important to you and your family.

### Why Research-First Matters

- **Information Asymmetry:** We uncover opportunities before they become mainstream.
- **Provider Intelligence:** We assess provider quality to ensure our clients receive top-tier services, based on thorough evaluation criteria.
- **Timing Advantage:** Early identification of opportunities and risks helps families act ahead of the curve.
- **Customization:** Every recommendation is backed by research and tailored to your family's structure and goals.
- **Objectivity:** We evaluate providers and strategies based on merit—not internal capacity or legacy relationships.
- **Integration:** We ensure best-of-breed solutions work cohesively within one seamless family office experience.
- **Continuous Insight:** Ongoing research and monitoring keep your strategy aligned with evolving markets and regulations.

# SERVICE PILLARS



STABILITY, CONFIDENCE, & CLARITY

## MISSION CRITICAL SERVICES

- Investment & portfolio management
- Personalized wealth strategy
- Holistic consolidated reporting
- Technology stack & client experience
- Insurance portfolio management (life, PPLI)



STRATEGIC INSIGHT & OPPORTUNITY

## HIGH-VALUE-ADD SERVICES

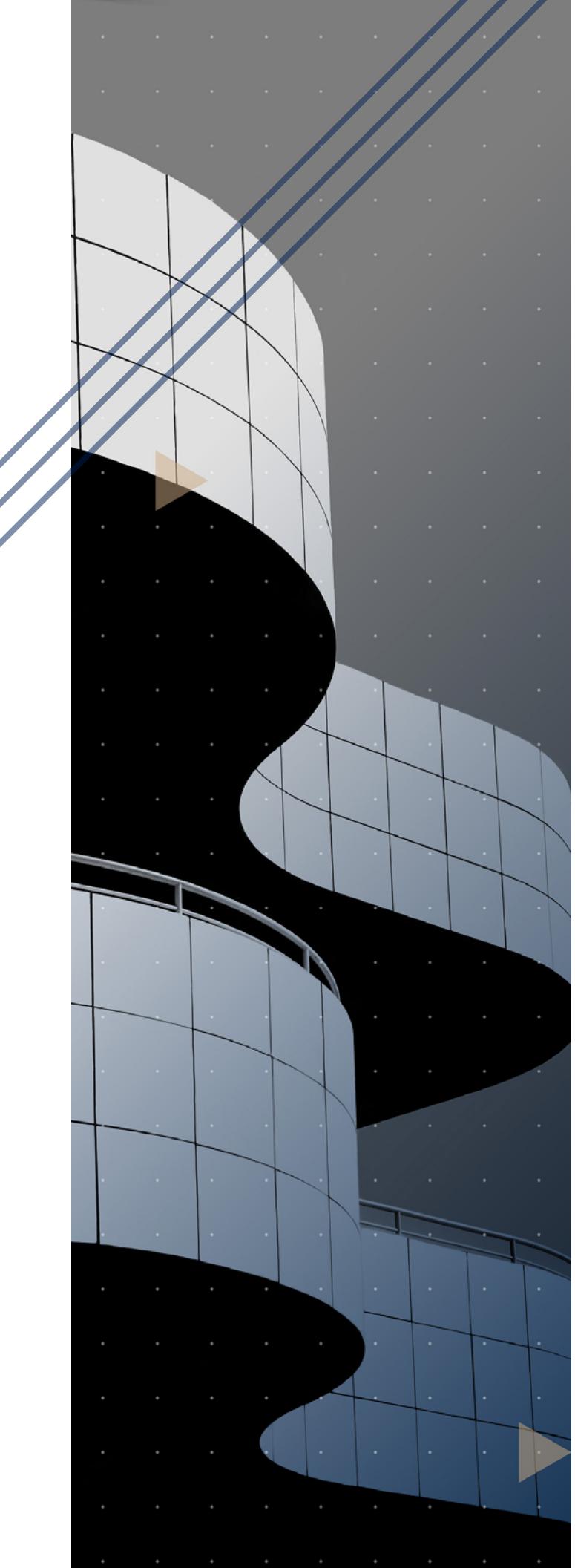
- Client sourced investment due diligence
- Philanthropy management
- Trust services & administration
- Family business strategy
- Family governance including next gen engagement
- Cybersecurity solutions
- Real estate modeling & analysis



CONNECTION, EXCLUSIVITY, & LEVERAGE

## CURATED ACCESS

- Private aviation and concierge travel consultation
- Concierge medical analysis and referrals
- Service provider vetting
- Network access and relationship mapping
- Networking events
- Family office group activation



## OUR APPROACH

### Goal-Centric Alignment

- Wealth strategies aligned with your family mission and values.
- Success measured by achieving your objectives, not arbitrary benchmarks.
- Clear accountability for all wealth decisions.

### True Partnership

- Focuses on controlling fees, taxes, and risk—not market-chasing.
- Creates freedom to recommend solutions regardless of where assets are held.
- Concentrates on long-term sustainability rather than short-term gains.

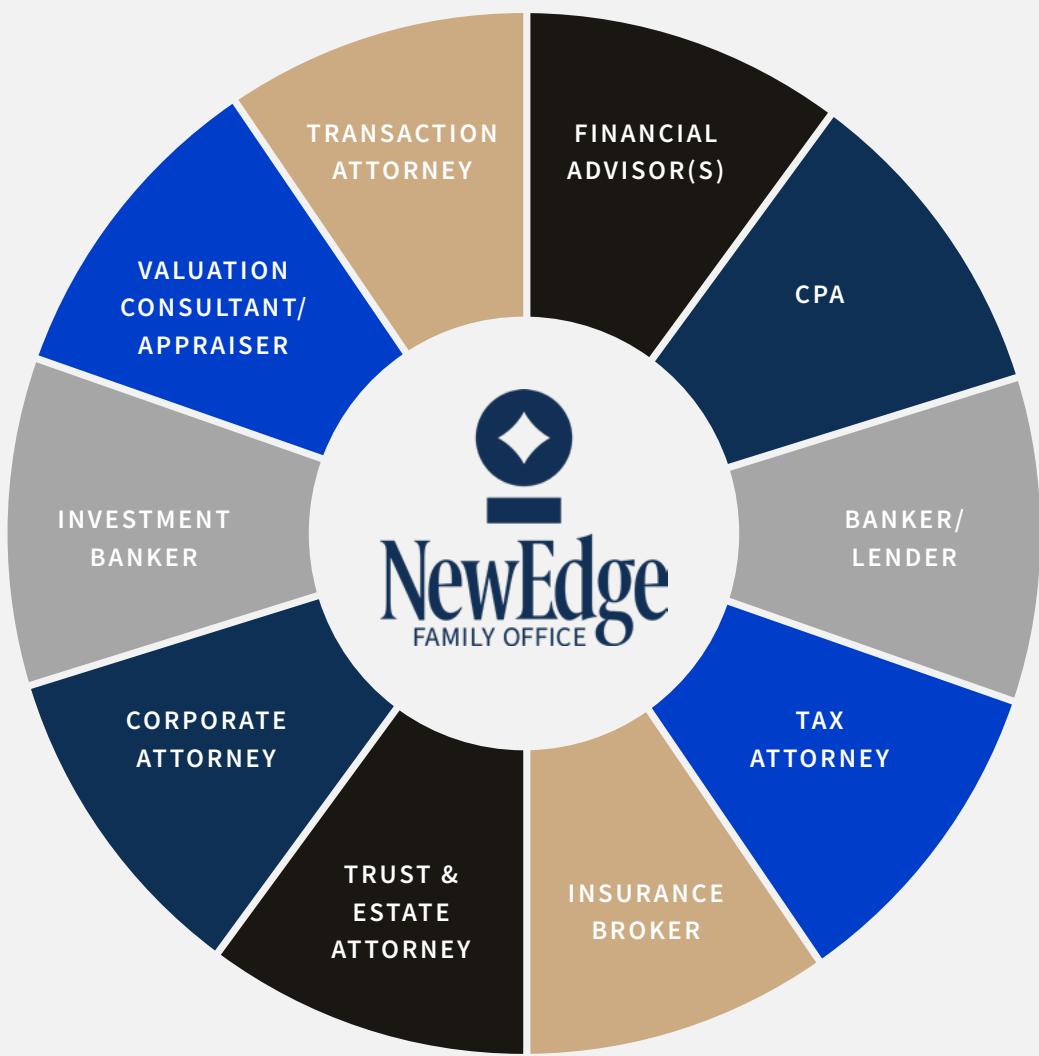
### Research-First

- Providers are sourced, vetted, and integrated through rigorous due diligence.
- We aim to ensure that every recommendation is driven by data, striving to minimize product bias.
- Ensures your strategy is informed, timely, and adaptable.

### Technology-Enabled Clarity

- Enables real-time alignment monitoring and adjustment.
- Provides a transparent view of how all assets serve your goals.
- Identifies and eliminates hidden fees and inefficiencies.

## WHO'S MANAGING YOUR WHEEL?



## NEWEDGE FAMILY OFFICE CAN

- Serve as the “financial quarterback” for your family, consolidating data from each trusted partner and coordinating the flow of information across all parties.
- Provide a total view of your wealth and identify the potential drivers of performance and potential opportunities that should be considered.
- Bring new solutions and advisors into the mix designed to work directly with families such as yours, without adding more complexity to your life.



## OUR COMMITMENT TO YOU

- Curated and comprehensive team dedicated to your relationship and based on your needs
- Direct contact information to entire coverage team with a single point of coordination and communication
- Rapid response to issues as they arise
- A proactive and coordinated relationship
- Regularly scheduled monthly contact
- Regularly scheduled quarterly review

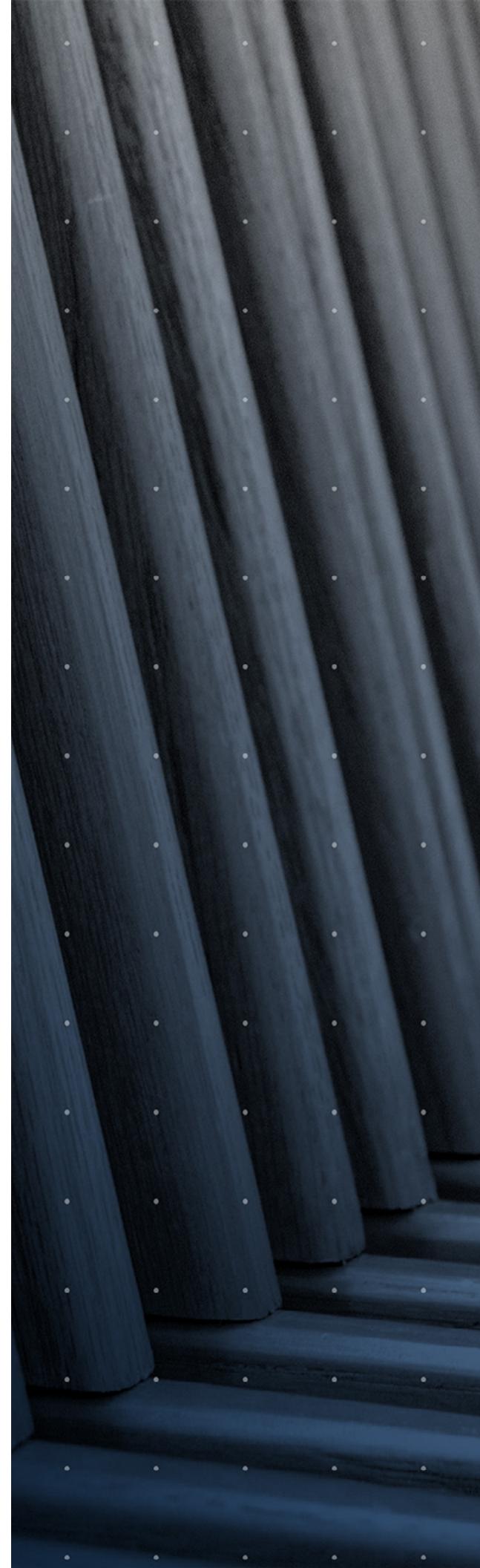


# Your Wealth. Your Vision. Perfectly Aligned.

Move beyond the limitations of the traditional model.  
Experience the clarity, precision, and confidence of  
wealth through NewEdge Family Office solutions.

Let's talk.

For more information, email  
[albatross@newedgefo.com](mailto:albatross@newedgefo.com).



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