Chilton Trust Overview

Disrupting the Wealth Management Establishment

The firm's founder, Richard L. Chilton, Jr., and senior management identified a void in the wealth management industry

Large Trust Companies, Banks and Brokerage Firms

Smaller Private Banks and Registered Investment Advisors

CHILTON TRUST

Banks and large brokerage houses are able to offer institutional pedigree and investment scale but often lack performance and high touch client service capabilities in a truly "conflict free" business model.

Smaller private banks often provide a more independent business model – free from internal product pushing and layers of fees – but lack the investment rigor or resources typically found at larger institutions.

To fill this void, Chilton Trust Company was established as an answer for ultra-high net worth families, foundations and institutions to whom we can provide a balance of high-end client service and top notch investment pedigree.

Firm Origins

- ✓ Founder and senior leaders are investment managers and business owners who understand from personal and professional experiences the need for a differentiated approach to wealth management and client service
- ✓ A deliberately "disruptive" business model focused on providing bespoke solutions for today's multi-faceted and complex client needs
- ✓ Composed of seasoned professionals who provide answers to clients directly and are not working through a leveraged business model of "go-between" contacts

Chilton Advantages

- ✓ Direct access to all senior professionals including client advisors, portfolio managers, family office service professionals and fiduciary officers
- ✓ Chilton professionals work *with* clients to provide sophisticated and flexible services to meet their needs in a timely fashion
- ✓ Independent and privately owned by principals who manage the Firm and are personally invested in the Firm
- ✓ Un-conflicted business model with no product sales or hidden fees and agendas

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CHILTON TRUST

An Innovative Approach to Wealth Management

✓ Superior and Bespoke Client Services

We are not in the business of "gathering" assets – as a privately owned company, we are focused on partnering with clients whom we can serve over the long term

- Dedicated team focused on servicing each client, composed of experts to meet each unique and complex family situation
- Culture of collaboration and cooperation, working alongside our clients and their advisors
- We understand our responsibility as an advocate and caretaker of our clients
- We provide full transparency, agnostic implementation and alignment of interests

✓ Top-Tier Investment Management Services

Deep investment culture and rigorous standards of performance excellence since 1992

- Each portfolio is tailored to the client's risk appetite, investment needs and guidelines after thoughtful discussions and dialogue; we do not rely on "off-the-shelf" solutions
- Internal Equity and Fixed Income capabilities as well as external manager selection and monitoring
- Equity team led by renowned investor, Richard L. Chilton, Jr.
- Fixed Income team led by former Federal Reserve Economist, Timothy W.A. Horan
- Manager Selection led by tenured investment manager, Louisa Ives
- Our position as an investment manager gives us an edge in evaluating managers, and our history in the industry gives us unique access to best in class third party managers

✓ Comprehensive Trust Services & Sophisticated and Nimble Solutions

Established with purpose to act quickly and efficiently

- Full suite of fiduciary and trust services, including corporate trustee services and administration
- Partner with over 15 custodians and have flexibility to work with custodians that suit clients' needs
- Chilton's proprietary trading platform has buy-side market access to over 70 broker dealers with access to 24 hour global coverage
- Supported by a broad and robust infrastructure that provides middle-office and back-office support, we are in control of the entire client experience – from trade execution and compliance monitoring to research and portfolio management

✓ Tailored Family Office Services

We act as a single family office with the resources of a multi-family office

- Deep understanding of the complex needs of families, having transitioned from a single family office to a multi-family office
- Accountants, controllers and bill payers work together to cover all services for families, from compliance to concierge
- Customized consolidated reporting which provides timely, meaningful and actionable management information
- Proactive communication and a commitment to the multi-generational family structure