

# Serving the needs of family offices

Understanding what matters to you and your family

Each family is distinct in its values, goals and priorities. This is why everything we do at Deutsche Bank Wealth Management starts with a conversation—and a full understanding of what matters to you and your family.

We have been a trusted partner to wealthy individuals and families for more than a century. Given our long history, which originated with Bankers Trust Company in 1903, we understand that it takes commitment and resources to meet the multifaceted needs of family offices. We believe the best way to help our clients navigate the intricacies of significant wealth requires a dedicated partner who can discern your needs, provide holistic solutions, and coordinate the necessary specialists seamlessly.

### Our commitment: listen earnestly, advise wisely and execute masterfully

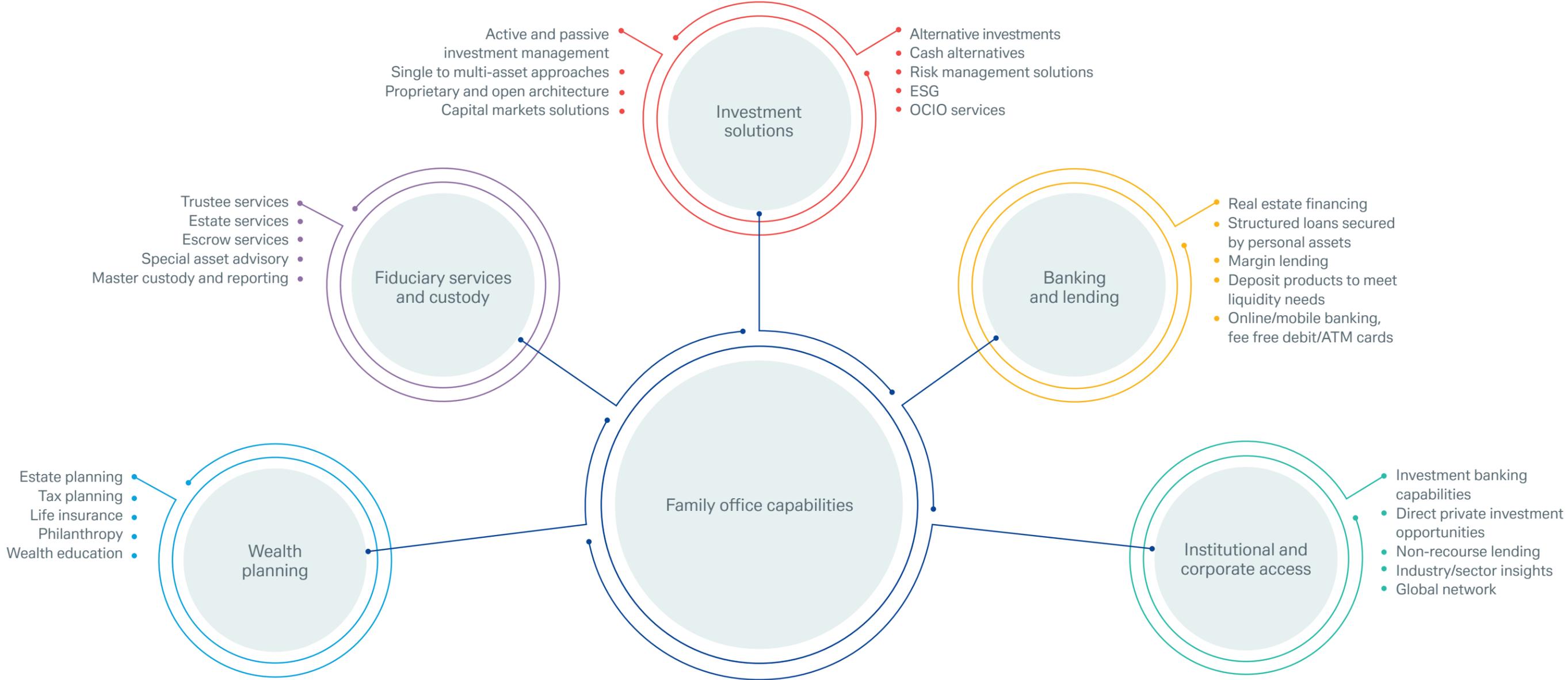
Every relationship is unique for us. Our family office relationship team is your access to the extensive resources of Deutsche Bank, and will work alongside you and your advisors to address everything from your day-to-day requirements to your long-term plans. Your team serves as your single point of contact and applies the highest standards of care by drawing upon our three key pillars of service: insight, agility and expertise.

## The three pillars of service for our family office practice



Our absolute commitment to our clients combined with our personalized approach to servicing families is the reason clients make a long-term commitment to us.

# Overview of our capabilities



## A few highlights

**Fiduciary capabilities**  
 Our corporate trust services are built on the foundation of one of America’s foremost trust companies, Bankers Trust Company, founded in 1903 and thus representing a long, uninterrupted history. Our trust personnel average 20 years of experience and manage over 2,000 trust accounts and \$10 billion in trust assets<sup>1</sup>.  
  
 Our trust companies include: Deutsche Bank Trust Company Delaware, Deutsche Bank Trust Company Americas (NY) and Deutsche Bank National Trust Company (CA).

**Philanthropy**  
 Wealthy families often have a strong commitment to giving back to society in a range of different ways. We can provide guidance and insight on charitable vehicles and best practices to achieve your philanthropic and legacy goals. To help realize your vision, our team can assist you in distilling and conveying a philanthropic plan.

**Wealth education and the next generation**  
 Our Next Generation program has been built exclusively for our clients’ children to help them gain a deeper understanding of financial literacy and family legacy. It comprises three flagship events in New York, California and Europe, each with its own theme. The seminars promote peer and industry networking opportunities along with access to specialists on topical subjects such as global markets, succession planning, investment management, cyber security and innovation.

**Network of advisors**  
 Given our sophisticated client base, we view family wealth through a unique lens. Over our many years of interacting with our clients’ advisors, we have cultivated a wide circle of tax and legal experts in multiple jurisdictions across a broad range of topics. As such, we have a vast network of lawyers, accountants and other trusted advisors to whom we can introduce our clients, when needed.

# Our one-team approach: A seamless extension of your family office

We pride ourselves on being an objective member of your team. Our family office relationship team works hand-in-hand with your advisors and our internal specialists. No matter where your advisors are located or how elaborate your situation, we have the ability to fully coordinate, integrate and execute your plans.



Our goal is to advise, manage and administer the assets of our clients, meeting their objectives by providing breadth and depth of professional expertise. We strive to build strong, lasting relationships based on performance, quality and integrity for our clients, their children and their grandchildren.

# About Deutsche Bank Wealth Management

Deutsche Bank Wealth Management serves as the trusted advisor to ultra-high-net-worth individuals, families, family offices and select institutions. With practices in the Americas, Europe and Emerging Markets, we are one of the largest wealth managers globally. As a full-service wealth management firm, we offer our clients a comprehensive suite of private banking products and services, including access to the broader financial offering of Deutsche Bank. Please visit [deutschewealth.com](https://deutschewealth.com) to learn more about our capabilities.

We would welcome the opportunity to work with you. For more information about our family office practice, please contact your Relationship Manager.

<sup>1</sup> As of 12/31/20.

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