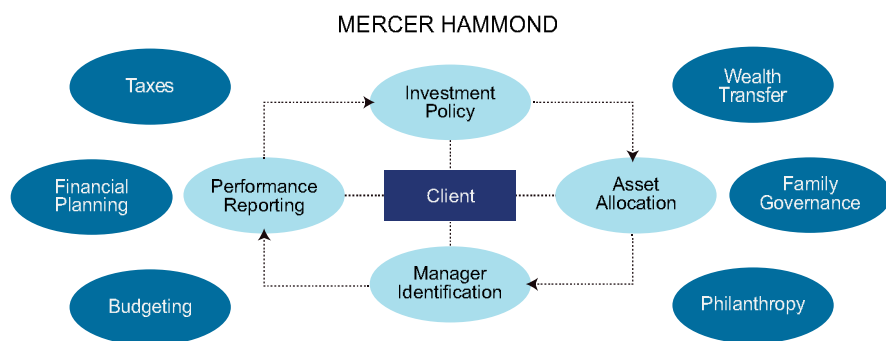


# MERCER PRIVATE CLIENT INVESTMENT CONSULTING

ARE YOU A MULTI-GENERATIONAL  
FAMILY WITH COMPLEX INVESTMENT  
NEEDS?

IF SO, MERCER CAN HELP.

Our private client investment consulting team specializes in the formation and implementation of financial strategies meeting the unique objectives of each family. We coordinate with your tax planning, and concierge service providers. We work with clients ranging in size from high net worth individuals with \$25 million to family offices managing portfolios over \$1 billion.



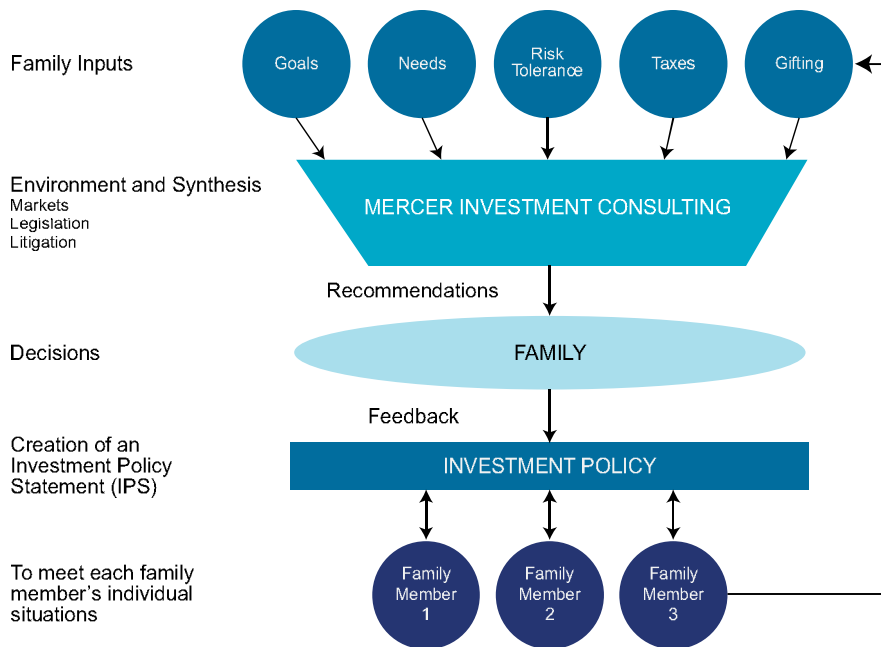
## KEY FACTS

(As of 12/31/12)

- Nationally, we have 43 private wealth clients with a total of \$6.8 billion in assets.
  - Twenty-eight have less than \$100 million in assets under advisement.
  - Eleven have between \$100-\$500 million in assets under advisement.
  - Four have more than \$500 million in assets under advisement
- Average client to consultant ratio is 7:1
- 110+ full time manager researchers globally

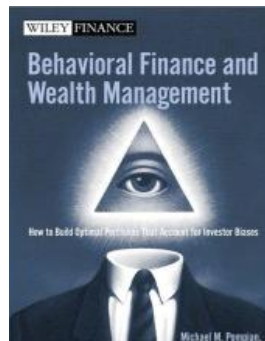
## CUSTOMIZED PORTFOLIOS

For all clients, we work to create investment plans uniquely tailored to their needs, covering investment policy, asset allocation, manager selection, and performance reporting.



## DISCIPLINED PROCESS

Michael Pompian wrote *Behavioral Finance and Wealth Management*, a handbook on investor behavior that establishes a comprehensive framework for understanding and addressing individual and family decision-making. The book covers 20 specific biases that make it difficult for investors to make rational decisions about their portfolio. We believe our experience can help families manage the effects of these biases.



For more information, please contact:

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References to Mercer shall be construed to include Mercer LLC and/or its associated companies.

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