GLOBAL FAMILIES, COMPLEX NEEDS

The US has become an increasingly popular destination for global private wealth. Yet, not all wealth managers have the sophistication level required to truly satisfy the needs of cross-border investors. That’s why we’re here to help. We welcome global families and foreign investors and have the expertise to meet their distinct challenges.

GLOBAL FAMILIES HAVE UNIQUE NEEDS

We recognize that global families want to make careful investment and wealth planning decisions, but may feel overwhelmed by cross-border complexities:

- Complicated and ever-changing local and cross-border income and transfer tax laws
- Abrupt account closures or drastically increased minimums by major US banks and brokerage firms due to heightened regulatory costs and reporting scrutiny
- Differing advice, fees, offerings and service levels for US and non-US resident family members
- Disjointed or one-size-fits-all solutions that don’t work for families in multiple tax jurisdictions or with mixed citizenship status
- The need for proactive planning advice—and the ability to quantify trade-offs in a tangible way

These challenges can lead to planning paralysis—and missed opportunities.

OUR MESSAGE TO TRUSTED ADVISORS

We make it a practice to deal directly with other trusted advisors—such as attorneys, accountants, and other professionals—when overseeing our mutual clients’ financial affairs. We share a common goal: to address the challenges faced by global families and foreign investors who need cross-border investment and wealth planning advice. As part of this effort, we value your contributions and want to support you. We partner with you and work as an extension of your team to understand clients’ needs and address them holistically.

North America is increasingly attracting private offshore wealth

2016 US Offshore Wealth ($billions)

Source: BCG Global Wealth Market-Sizing Database, 2017

Bernstein does not provide tax, legal or accounting advice. In considering this material, you should discuss your individual circumstances with professionals in those areas before making any decisions.
WHAT SETS US APART

- We offer a broad array of global investment strategies on both onshore and offshore platforms with the flexibility to minimize US income, gift, and estate taxes for foreign clients.

- Our platform can accommodate evolving needs, seamlessly transitioning family members who become subject to US taxation (both pre- and post-immigration).

- We work with attorneys and accountants to develop actionable plans that produce meaningful benefits for families.

- We help clients quantify the financial impact of cross-border decisions, using our state-of-the-art planning and modeling capabilities.

- Clients enjoy continuous servicing by the same team—no need to transition due to jurisdiction changes—as well as integrated advice and fees for multiple family members, regardless of geography or platform.

- Our comprehensive yet easy-to-read reporting offers a robust snapshot of portfolio positioning and performance across platforms.

  Our dedicated team of planning and investment professionals can help simplify complex planning challenges.

  We're here to help you evaluate choices, take action and have the confidence that you are doing what is best for your family.

A Global Research and Management Platform*

- $500 Billion+
  Assets under management

- Offices in 48 Cities in 22 Countries

- 50 Years
  Helping clients reach their financial goals

- 100%
  Revenue from investment research and management

- AB
  Regulated by SEC and FINRA, covered by SIPC insurance**

PUT THE POWER OF BERNSTEIN TO WORK FOR YOU*

Bernstein is part of AB, one of the world’s largest investment firms, managing over half a trillion dollars in assets for individuals, institutions, not-for-profit organizations, pensions, and foundations around the world. Bernstein is the boutique private wealth arm that manages about $90 billion of the total, and our clients benefit from the skill and experience of more than 3,000 employees in 22 countries around the world.

* As of September 30, 2017.
** SIPC coverage only extends to assets for which Sanford C. Bernstein & Co., LLC provides custody.

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