Bernstein Private Wealth Management Partnerships

Partnerships are fundamental to addressing the complex challenges our clients face. We consider them an integral extension of the Bernstein client experience.

We've developed a rigorous governance process to select a few thoughtfully chosen partners, each a leader in their respective fields, who share our commitment to providing exceptional, personalized support. This approach fosters an ecosystem of meticulously vetted national partners along with our advisors' curated network of top-tier professionals, offering clients access to exclusive experiences, expert guidance, and concierge services, allowing them to focus on the people and passions that matter most to them.

Art Advisory

Comprehensive services in advisory, investment, and appraisals including expert guidance in acquisitions, collection building, sales, and financing. Offered through an independent, global team of art advisors and finance experts with more than 20 years of experience.

Aviation Advisory

Private aviation services for fractional owners, card program participants, and charter flyers, including continuous assessment of agreements, mission support for new bookings, and financial stewardship through auditing and cost analysis. Provided by a trusted, unbiased advocate that aims to improve service experiences, minimize risks, and optimize clients' economics.

Corporate Trustee Services

Comprehensive, client-tailored trust management services offering highly personalized support for trust administration, fiduciary oversight, asset management, reporting, and trust tax return support. Offered by national providers as well as those in preferred jurisdictions.

Credit Advisory

Holistic credit/lending advice, including margin lending, securities-based lending, commercial/residential real estate mortgages, commercial and industrial lending, art financing, and other secured type financing. Available through our extensive network of banks and lenders to provide seamless credit solutions.

Custody and Reporting

Consolidated Reporting

Customizable reporting across multiple investment managers, including alternative assets, unlocking holistic portfolio insights. Facilitated through providers with best-in-class technology, security, and data platforms and presented with intuitive visualizations of the complete financial picture.

Crypto Custody

Best-in-class trade execution, custody, expert research, financing, and digital asset advisory services, all supported by white-glove service. Delivered through an institutional-grade digital asset platform with top-tier security and industry-leading pricing.

Self-Directed IRA Custody

Trusted non-discretionary custodial services specializing in custody of alternative assets in self-directed IRAs. Delivered through a fully integrated platform that includes custody, trade execution, record-keeping, and capital call support, with a focus on institutional-quality relationship management and white-glove client service.

Medical

Behavioral Health Concierge

Multi-disciplinary services for customized care and support for individuals, families, and organizations facing various challenges, including mental health, addiction, dementia, autism, eating disorders, elder financial abuse, and more. Offered by a leading provider known for its family coaching, employer services, and a broad network of over 400 expert clinicians.

Healthcare Concierge

Comprehensive, personalized, and proactive health management services, including illness prevention, diagnosis, treatment, and recovery. Accessed via a medical family office with physician-led teams combining clinical, communication, and service excellence through a network of expert physicians in over 200 cities worldwide.

Philanthropic Services

Customized Philanthropic Research

Research-backed, strategic philanthropic expertise customized for donors, foundations, and financial institutions. Provided by one of the largest grantmaking institutions in the United States.

Donor-Advised Fund Services

Support for unlocking giving capacity while preserving long-term financial goals and enhancing philanthropic impact. Accessed through a powerful partnership with the largest national independent DAF provider.

Foundation Administration

Comprehensive foundation creation and management services, including access to a comprehensive digital platform, specialized tools, and expert guidance to optimize grantmaking and track impact. Offered by the nation's leading private foundation provider.

Grantmaking Support

Tailored philanthropic advice for individuals and institutions, including clarifying focus areas, identifying grantees, and aligning giving with values. Delivered through a philanthropic planning company supporting donors who want to be more intentional.

Residence and Citizenship Advisory

Expert advice and assistance in navigating the legal and financial aspects of investment programs offering citizenship or residency in different countries. Provided by a global firm specializing in residence and citizenship planning.

Risk and Security Advisory

Customized security and risk management services, including risk assessments, cybersecurity support, crisis response, security training, close protection, investigative support, and more. Provided by a firm with 50 years of experience advising global organizations and families with discreet and comprehensive solutions.

Tax and Insurance Planning

Exchange Fund

A strategic solution for diversifying concentrated stock positions without triggering immediate capital gains taxes, allowing for greater portfolio flexibility. Provided by a leading financial institution specializing in exchange fund management.

Private Placement Life Insurance (PPLI)

A sophisticated wealth management tool offering tax-efficient investment growth and estate planning benefits through customized insurance solutions. Offered in partnership with premier providers of private placement life insurance services.

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