BALLENTINE
PARTNERS

PRESS RELEASE

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BALLENTINE PARTNERS WELCOMES BACK BRUCE SIMON

WALTHAM, MA (June 1, 2016) - Ballentine Partners is thrilled to welcome Bruce Simon back to the firm, this time in the firm's Florida office. Bruce served as CIO of the firm from 2007 to 2011, before relocating with his family to California for warmer weather. Now with the successful launch of the firm's Palm Beach Gardens office late last year, Bruce is rejoining the firm in the role of Managing Director and Director of Portfolio Research, reporting to Will Braman, Ballentine's Chief Investment Officer.

Mr. Simon will work directly with a number of family clients and will serve on the firm's Investment Management Committee, which is responsible for the oversight of all of the investment activities of the firm.

"We are thrilled to have Bruce return to the Ballentine team," said Drew McMorrow, President & CEO. "With recent client liquidity events as well as the addition of new clients, we are pleased to invest in the governance of our investment team by increasing our senior resources, which includes adding Bruce to our Florida team."

"I am excited to be back at Ballentine Partners where I know I can apply my many years of investment experience to help client families achieve their investment goals," said Bruce. "With Ballentine's comprehensive and objective approach, I can be certain that the investment recommendations I am making are in the best interests of my clients, which is of the utmost importance to me. I am thrilled to be back."

Bruce D. Simon, CFA, CPWA® rejoined Ballentine Partners in June, as a Managing Director and Director of Portfolio Research. Most recently, Mr. Simon was Senior Managing Director and Chief Investment Officer at City National Rochdale, where he managed the investment activities for the $28B Registered Investment Advisor affiliate of City National Bank. Prior to City National, Bruce served as Chief Investment Officer of Ballentine Partners, Morgan Stanley's Private Wealth Management division in New York, and Glenmede Trust in Philadelphia. Bruce received an MBA in Applied Economics from George Washington University and a BS degree from Penn State University. He holds the Chartered Financial Analyst (CFA) designation and is a Certified Private Wealth Advisor®. Bruce is a member of the CFA Institute.

About Ballentine Partners

Ballentine Partners is an independent wealth management firm providing comprehensive investment and family office services to wealthy families and entrepreneurs. The firm was one of the first to deliver independent, objective, and comprehensive financial advice for wealthy families 30 years ago, and continues to be a thought leader in the field. Ballentine's clients require comprehensive, integrated, and objective advice. The firm advises on more than $5.9b in assets under management (as of 12/31/2015). Ballentine scales its services to meet the breadth of clients' needs, whether it's investment management and planning for an entrepreneur or a full suite of family office services for a multigenerational family, including family meetings and education, philanthropic advising, and family office administration.

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