

CEO FOUNDERS

Family Office Built For Entrepreneurs



CRESSET
PagnatoKarp

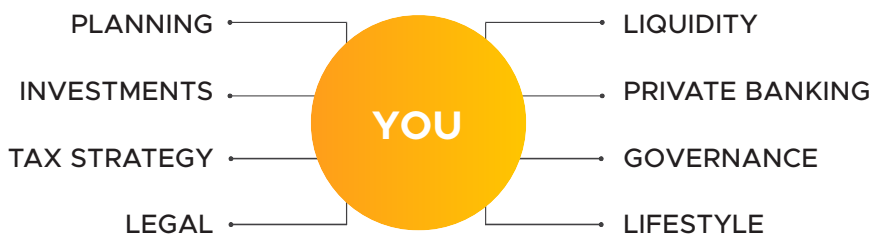
DRIVEN BY INNOVATION

Award-winning, multi-family office founded on Transparency® to deliver a new paradigm for wealth management. We have democratized and digitized the Family Office experience in a cost-efficient way. Our goal is to protect, enhance, and simplify your life, giving you time to pursue what matters to you most.

We have assisted well over 115 entrepreneurs through liquidity planning and selling a business, advising on pre-sale and post-sale planning, exit strategies, transition and succession planning.

A True Fiduciary® firm built by clients, for clients. The focus is asset protection, tax savings, cash flow strategies, estate planning and risk management to help avoid costly missteps and guide you on the path to financial freedom.

YOUR FAMILY OFFICE EXPERTS



Serving the unique advisory needs of entrepreneurs, CEO Founders, executives, and private equity partners, as well as high-net-worth and multi-generational families.

#1

2020 Best Multi-Family Office¹

\$11.2B

Assets Under Management¹

115+

Entrepreneur Liquidity Events¹

2020

Barron's Top 100 RIA Firms¹

TOP 25

Largest RIAs in the Country²

70/30%

Employee/Client Owned

Bringing together the resources you need at each step of your journey to reinvent the way you experience wealth.

FINANCIAL
INDEPENDENCE

LIFESTYLE
ENHANCEMENT

YOUR NEXT
VENTURE

PAGNATOKARP.COM

Cresset refers to Cresset Capital Management and all of its subsidiaries and affiliates. Cresset Asset Management, LLC provides investment advisory, family office, and other services to individuals, families, and institutional clients. Cresset Partners, LLC provides investment advisory services strictly to investment vehicles investing in private equity, real estate and other investment opportunities. Cresset Asset Management, LLC, also conducting business as PagnatoKarp ("Advisor") and Cresset Partners, LLC are SEC registered investment advisors. [1] <https://cressetcapital.com/disclosures/> [2] Source: Based on the methodology used from Investment News' RIA Data Center AUM. Most recently updated on June 5, 2019, for fee-only advisors <https://data.investmentnews.com/ria>

BOUTIQUE FAMILY OFFICE

Customized Solutions



CRESSET[®]
PagnatoKarp

1

Goals-Based
Planning
& Investing

2

Tax
Strategy
& Planning

3

Wealth
Strategy
& Liquidity

4

Public
& Private
Investments

5

Estate,
Philanthropy
& Legacy

6

Banking
& Credit
Consulting

7

Family
Governance
& Education

8

Lifestyle
& Wellness
Resources

TRUE FIDUCIARY[®] STANDARDS¹

In Your Best Interest

- 01 Embrace the Legal Fiduciary Obligation to Place Clients' Interests First
- 02 Deliver Comprehensive Financial Planning
- 03 Provide Fee-Only Advice
- 04 Do Not Accept Commissions
- 05 Receive Only One Source of Revenue: Client Fees
- 06 Provide Transparency on Portfolios and Investments
- 07 Remain Independent from any Bank, Broker Dealer, Insurance or Custodian
- 08 Measure Client Performance Returns Using Independent Third Parties
- 09 Do Not Create Products to Sell or Price Any Public Securities
- 10 Do Not Hold Any Client Assets, Securities or Money

OUR ECOSYSTEM

Connecting Founders & Partners Through Peer-to-Peer Networks and Exclusive Events



“We built Cresset to provide opportunities which were once only available to multi-billion-dollar families. Thinking like a ten billion dollar single-family office, we developed an award-winning shared services platform to deliver the same resources and experiences at a fraction of the cost.”

— Eric Becker & Avy Stein, Cresset Co-Founders

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