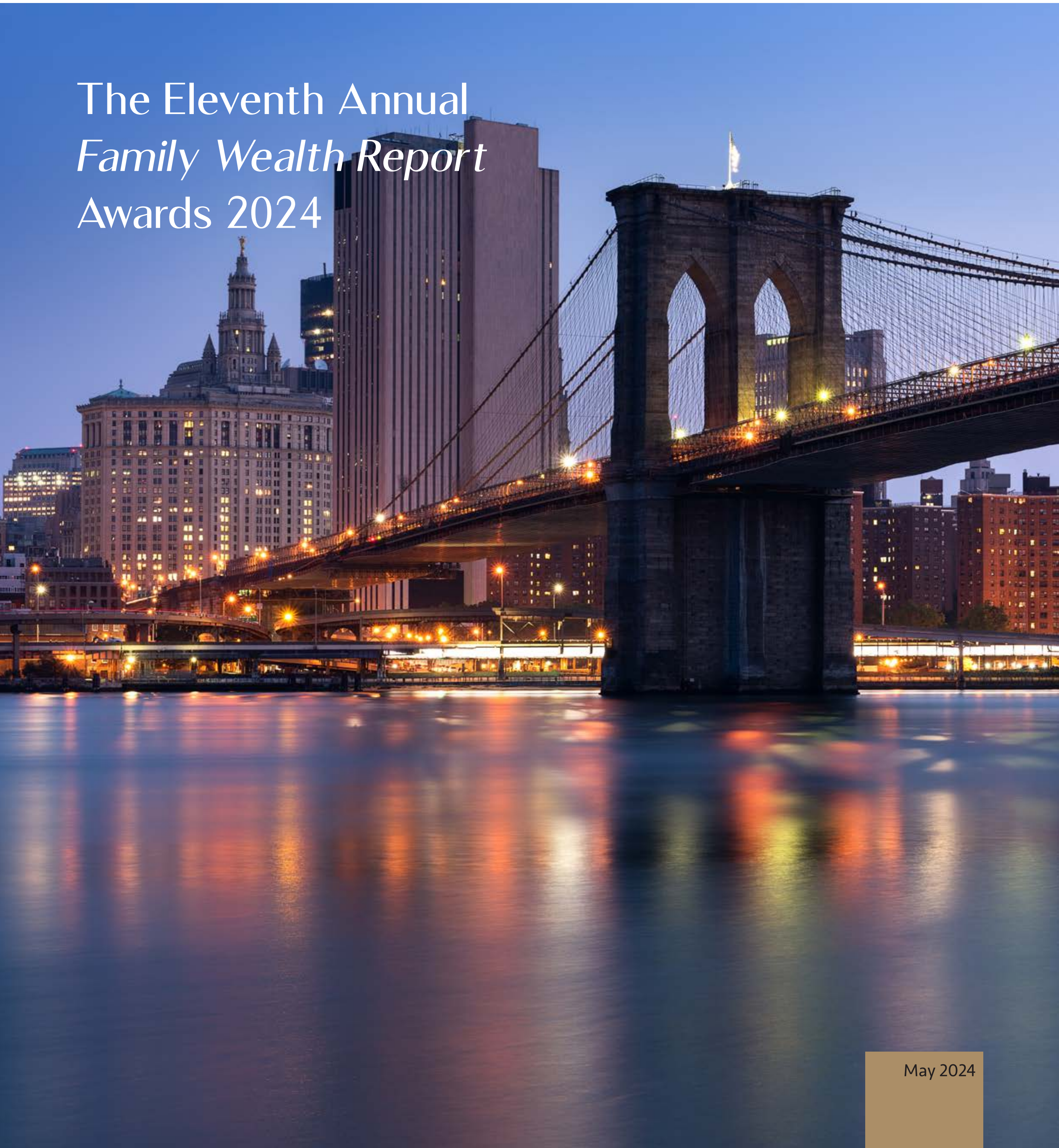
ACCLAIM

RECOGNIZING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY

THROUGH THE Family Wealth Report AWARDS PROGRAM

The Eleventh Annual *Family Wealth Report* Awards 2024



May 2024

Driven By Our Clients' Goals

Gabrielle Bailey - Chief Fiduciary Officer
Thomas Melcher - Director of Private Wealth
Glenmede

Winner

- ***Fiduciary or Trust Services***
- ***ESG Investing (Product)***

The Glenmede Trust Company, N.A. ("Glenmede") is among the nation's leading investment and wealth management firms. Together with its affiliates, Glenmede oversees $45.4 billion* of assets under management for high-net-worth individuals, families, family offices, endowments, foundations and institutional clients. Headquartered in Philadelphia, we have offices in Ohio, Delaware, Florida, New Jersey, New York, Pittsburgh and Washington, DC and employ over 400 individuals.

What was the winning formula of your firm/you that explains why you won?

Our unwavering commitment to helping our clients achieve their goals and the integrated approach of our tenured professionals define our winning formula. Whether a private wealth, endowment or foundation, or investment management client, our success is defined by their success. We take the time to deeply understand our clients and pride ourselves on being transparent and accessible throughout the partnership. We believe Glenmede has the scale to provide a wide range of expertise and solutions, while also being right sized to foster personal and enduring relationships with our clients.

Our employees are motivated to help our clients succeed. This is evident in our Trust and Fiduciary Services offering. Embracing our fiduciary heritage, we continue to serve the best interests of our clients. We have built highly trained and experienced teams who assist clients in better understanding their wealth picture so they can make prudent investment and financial decisions for the long term, consistent with their lifestyle, legacy and philanthropic goals.

What are you going to do to remain competitive and stay ahead?

Agility is one of our core values. We thoughtfully and strategically respond to the opportunities and challenges presented to us. Our history of providing sophisticated wealth and investment management serves as the foundation for exploring new opportunities and innovative solutions so we can continue to address our clients' evolving needs, concerns and priorities.

It is paramount that we remain forward-thinking and continue to stay on top of market trends and industry developments while never losing sight of our commitment to our clients' goals and objectives.

Where do you see the wealth management industry and your part of it going in the next five years?

First, we value our private ownership and believe it provides us with a unique perspective compared to publicly owned banks, RIAs and brokerage firms. Additionally, we expect technology will remain a dominant theme in our industry over the next five years. We continue to embrace technology and innovation while never straying from our core fiduciary values and goal of delivering an exceptional client experience.

How do you hope your firm will benefit from getting this award?

Winning this award for our Trust and Fiduciary Services offering is a testament to our firm's commitment to our fiduciary values. We are proud of our work empowering financial futures and helping our clients pursue their purpose, passions and legacy through integrated wealth management. We hope this award reinforces our clients' trust in us by recognizing our experienced, knowledgeable teams and our thoughtful, intentional approach to wealth management. This recognition can also serve as an opportunity for potential clients to explore our offerings and level of service, and consider partnering with Glenmede.

**as of 3/31/24*

GLOBAL AWARDS

Showcasing The Best in the Industry

*Independence, **integrity** and genuine **insight** are the watchwords of the judging process.*

2024 Announcements Schedule

18 JANUARY 2024
Miami *Family Wealth Report* Awards incorporating Latin America & the Caribbean

8 & 22 FEBRUARY 2024
WealthBriefing Swiss Awards
WealthBriefing WealthTech Americas Awards

6 & 21 MARCH 2024
WealthBriefing Swiss EAM Awards
WealthBriefing European Awards

2 & 30 MAY 2024
Family Wealth Report Awards
WealthBriefingAsia & Greater China Awards

27 JUNE 2024
WealthBriefing Wealth *For* Good Awards

3 OCTOBER 2024
WealthBriefingAsia EAM Awards

21 NOVEMBER 2024
WealthBriefing MENA Awards

5 DECEMBER 2024
WealthBriefing Channel Islands Awards

FamilyWealthReport AWARDS2024 MIAMI, LATIN AMERICA & CARIBBEAN

WealthBriefingAsia GREATER CHINA AWARDS 2024

WealthBriefing SWISS AWARDS 2024

WealthBriefingAsia AWARDS2024

WealthTechAmericas AWARDS2024 brought to you by WealthBriefing

WealthForGood AWARDS2024 Global Awards by WealthBriefing

WealthBriefing SWISS EAM AWARDS 2024

WealthBriefingAsia EAM AWARDS2024

WealthBriefing EUROPEAN AWARDS 2024

WealthBriefing MENA AWARDS 2024

FamilyWealthReport AWARDS2024

WealthBriefing CHANNEL ISLANDS AWARDS 2024

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