1919 INVESTMENT COUNSEL
Complexity to Clarity

1919 Investment Counsel was founded on the belief that no two clients are alike. For over a century, we have been delivering services and tailored solutions that preserve, build, and manage wealth. We are committed to helping our clients achieve their financial goals with thoughtful advice.

1919 Family Office Services

We are a multi-generational firm, serving multi-generational wealth. For over a century, we have been helping clients preserve and grow their wealth, their family's values and legacies.

Our Solutions and Strengths for a broad range of client needs

*Includes Inclusive Investing Strategy.

Complexity to Clarity

Our high net worth clients often have complex financial needs and 1919's team-oriented approach ensures that our team grows with your family. Nearly half of our AUM has been managed for more than 20 years and $1.4 billion for more than 50 years.

How We Can Serve Your Family

In each interaction with our clients, we are guided by the first order principle, "To understand before advising." This is the foundation of what we do and we know that no two families are the same. We will seek to appreciate what is most important your family, lifestyle and your legacy to ensure that our advice and counsel supports your family goals and aspirations.

Tailoring Wealth Strategies to Your Family

Our experienced team of advisors will work with you and your family to design and tailor a wealth strategy that reflects your uniqueness and execute on that strategy across multiple generations. 1919's Family Office capabilities are interdependent and integrated to deliver optimal lifestyle financial advice and management. We work collaboratively to support your needs, goals and aspirations.

Additionally, as an independent investment counsel firm, we have created a platform that minimizes inherent conflicts of interests in the management of our clients' assets.

At 1919, we provide full-service Lifestyle Wealth Advisory capabilities for your family.

Customized Investing Strategies

- Investment Portfolios – tailored to meet tax, income, return, risk, and other objectives
- Transparency and Clarity – succinct and customizable reporting (net of all fees)
- Individual Securities – funds used selectively if needed for non-core asset classes
- Efficient Management – active tax management across accounts ("tax alpha")

Estate and Financial Planning

- Wealth Transfer Strategies
- Estate Planning and Plan Review
- Retirement and Financial Planning
- Business Succession Planning
- Risk Management Approach

Trust and Estate Administration Services

- Family Office Service (administrative services, planning, outsourced CIO services)
- Trust and Estate Administration (trustee or agency)
- Tax Compliance Services (provided by a third party)
- Family Business and Private Investment Accounting and Advisement

Philanthropic Strategies

- Private foundation administration, coordination and succession planning for families
- Charitable lead and/or charitable remainder trusts
- Integration of philanthropic goals into financial plans and testamentary estate plans
- Oversight of annual giving plans and optimization of gifts including use of DAFs

The cornerstone of 1919 Family Office Services is the role we play in helping your family, providing the governance necessary to preserve the family's legacy and support collective values. We deliver structure for communication, family meetings, education and mentoring to help your family navigate through complexity and build long-term sustainable wealth. The result is peace of mind that comes from knowing that your family is being advised by a team of educated, experienced professionals.

About 1919 Investment Counsel

1919 Investment Counsel, LLC is a registered investment advisor. Its mission for more than 100 years has been to provide counsel and insight that help families, individuals, and institutions achieve their financial goals. The firm has offices across the country in Baltimore, Birmingham, Cincinnati, Houston, New York, Philadelphia, San Francisco and Vero Beach. The firm has approximately $17.3 billion in client assets under management (as of June 30, 2022), of which approximately $2.2 billion are in Socially Responsible Investments. 1919 Investment Counsel seeks to consistently deliver an extraordinary client experience through its independent thinking, expertise and personalized service. To learn more, please visit our website at **www.1919ic.com**.

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