19 19 INVESTMENT COUNSEL
Complexity to Clarity

Family Office Services

We have been serving multi-generational wealth for over a century, helping our clients preserve and grow their wealth through tailored investment counsel that is aligned with their family's values and desired legacy.

Our Solutions and Strengths for a broad range of client needs

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 seek to understand what is most important to your family, lifestyle and 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.

Complexity to Clarity

The cornerstone of our family office services is the role we play in helping your family bring clarity to your complex financial needs, providing the governance necessary to preserve your 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.

At 1919, we are *your family office*, and we offer a full range of capabilities that can be tailored to your family's needs.

Customized Investing Strategies	• Investment Portfolios – tailored to 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

About 1919 Investment Counsel, LLC

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, New York, Philadelphia, San Francisco and Vero Beach. 1919 Investment Counsel, LLC 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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