

Private Bank



Citi Private Capital Group

At a glance

The needs of the world's wealthiest individuals, families, and their family offices are evolving rapidly. As their wealth continues to grow, so does the complexity of the planning, investing, banking, lending, and administration involved. And the more global that wealth and its owners become, the more intricate the tax, legal, and regulatory obligations that arise.

In response to all of these challenges, an increasing number of individuals, families, and family offices are taking an institutional-like approach to preserving and growing their wealth. To do so, we believe that they expect the same access, execution, and opportunities as their institutional peers.

The Citi Private Capital Group is dedicated to serving clients who are represented by private investment companies, family offices, and family enterprises. It seeks to provide them with services of the highest level of sophistication in such areas as investments, lending, family office services, liquidity and treasury management, personal interests such as philanthropy and art collecting, wealth planning, and related technologies.

Institutional execution

At the heart of our service is the notion that advice, coverage, and execution define institutional quality. This can take many forms. For some, it involves the ability to engage a professional in virtually any area on key matters such as company or thematic research, trading and portfolio strategies, risk mitigation, or leverage. For many others, advice on forming a family office or foundation, developing next generation leadership strategies, or creating an optimal investment processes is equally important. Regardless of need, geography, or level of complexity, the Citi Private Capital Group brings together the vast resources of Citi to fulfil your requirements.

Citi's competitive advantage

Citi has a long history of serving investment companies, corporations, and private clients. Today over 1,400 family offices and private investment companies¹ count on the Private Bank for wealth management, capital markets, banking and lending, custody, and trust services.

Our position in Citi's Institutional Clients Group means we can provide services and strategies to help emerging firms as well as many of the largest and most complex. Our ability to scale with you is the key to help ensure continuity, growth, and achieving your goals.

Our dedicated global team stands ready to work alongside you, no matter your needs.

Institutional services²

Our institutional access covers Citi's global banking network spanning over 160 countries, professionals from Citi's Commercial Bank, as well as from its Corporate and Investment Bank, and to Citi Research's network of around 400 analysts worldwide.

Our institutional-level services include:

- Direct market access
- Strategic equity solutions
- Direct private investments
- Commercial real estate financing

¹ As of 01/10/2019

² Only for qualified clients who meet eligibility requirements

Family office advisory

We have a long-established global network of experienced professionals across multiple sectors and disciplines who can take on one-off projects on your behalf, or support any ongoing, every day asset, liability, or real asset management. We can also draw upon the knowledge and expertise within Citi to advise you on all issues including capital management processes, wealth planning, liability management strategies, art advisory, real estate advisory, and aviation advisory.

Our advisory services cover:

- Customized portfolio analytics and problem solving
- Investment Policy Statements help and advice
- Customized portfolio construction and advice
- Assistance in the early stage
- Advisory services for philanthropy, art, and real estate
- Global networking with like-minded investment professionals

Our extensive experience working with family offices for over 30 years means we have unique insights and knowledge on the key issues that affect their day-to-day and future activities. We can offer advice and share best practices and ideas for family offices from those who are just established to those serving multiple generations.

We can help you with:

- Family office creation and organizational design
- Leadership and succession planning
- Executive reward and retention strategies
- Strategic planning
- Multi-generational wealth preservation
- Governance

Our full range of services include³

Investment services

Objective advice, manager research, and due diligence
Investment strategies ranging from traditional and alternative investments to capital markets
Foundation asset management
Direct investment and co-investment opportunities for eligible clients⁴
Portfolio and quantitative analysis
Risk management (portfolio & concentrated positions)
Global custody services

Lending solutions

Credit facilities of different types and structures for family enterprises and family assets
Commercial real estate lending and residential mortgages
Private equity capital call management
Financing available to lend against liquid financial assets, concentrated stock positions and hedge funds (including non-Citi affiliated)

Liquidity and treasury management

Banking and treasury management for personal and family enterprise accounts
Foreign exchange transactions
10b5-1 trading plans

Wealth planning strategies

Full range of fiduciary services
Estate and wealth transfer planning
Family foundation strategies
Integrated wealth plans for clients and multi-national exposure

Personal interests

Philanthropic and foundation advisory services
Art advisory and finance
Aviation finance
Sports advisory services

³ Not all products or services are available in all regions

⁴ Eligible and qualified clients who have a minimum net worth of US\$500 million

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