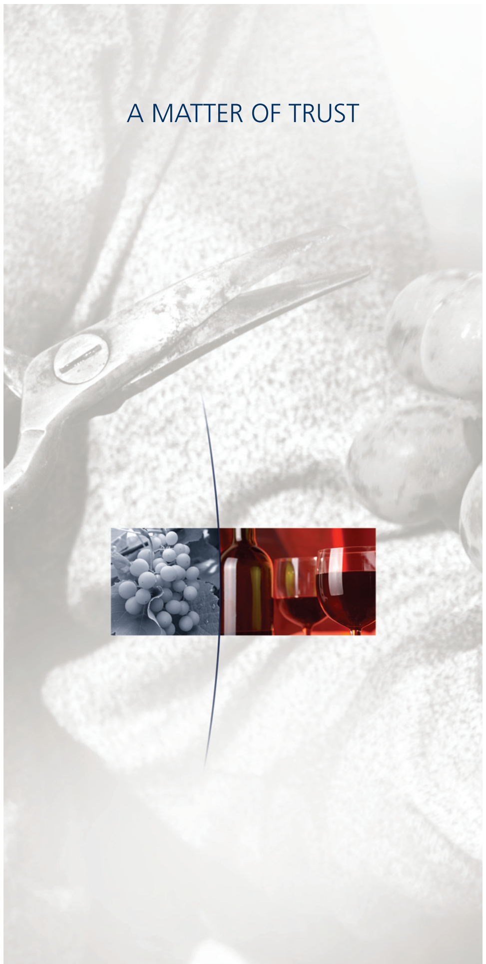
ATLANTIC TRUST

PRIVATE WEALTH MANAGEMENT

Case Studies: Creating Solutions and Strong Relationships

When Atlantic Trust understands your needs—whether for next year or the next generation—we develop solutions that are highly personal, a reflection of your values and customized to your goals.



Business for Sale:

Mapping a Moving Target

This was their baby. For 20 years, they developed it, nurtured it, and grew attached to it. Then they decided they might sell it—retirement was calling and their grown children had no plans to work in the business. Long-time clients of Atlantic Trust, the Wilsons had a significant and well-diversified investment portfolio. They also owned a meaningful stake in an unrelated private company poised to go public. The challenge they presented us with was creating and implementing an investment strategy that meets their retirement needs and addresses the impact of the possible sale of their business and their private equity investment. They were only in their mid-50s, so we had to take into consideration their long-term horizon. The plan we created together was designed to provide a blend of current income and long-term capital appreciation. The biggest unknown was the sale of the business—it's still a moving target with no firm decision or date. Our team, however, had to address this potential significant liquidity event, modeling scenarios for the eventual sale of the business. When that time comes, the Wilsons, like many entrepreneurs, may have a difficult time "saying goodbye," but they already have a plan in place to greet the next phase of their lives.

This case study is based on actual Atlantic Trust clients' experiences, but names and certain details have been changed to protect our clients' privacy.

Atlanta 404 881 3400	Chicago 312 368 7700	New York 1330 Ave. of the Americas 212 489 0131
Austin 512 651 7800	Denver 720 221 5000	New York 50 Rockefeller Plaza 212 259 3800
Baltimore 410 539 4660	Houston 713 214 7640	San Francisco 415 433 5844
Boston 617 357 9600	Newport Beach 949 660 0080	Washington, DC 202 783 4144