

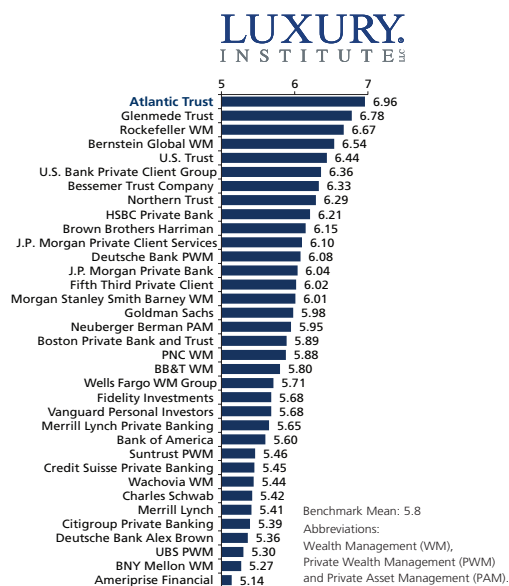
# ATLANTIC TRUST Awards & Recognition

## A Recognized Leader

In 2011, Atlantic Trust continued to earn national recognition for excellence in private wealth management, client service and family office services:

- Top U.S. Wealth Management Firm, *The Luxury Institute*
- Best Private Wealth Manager in Overall Client Service, *Private Asset Management*
- Top Family Offices, *Bloomberg*
- Top Wealth Managers, *Barron's*
- Top Private Banks, *Barron's*

These awards and rankings, along with our 18 consecutive quarters of positive net flows, validate Atlantic Trust's commitment to serve as our clients' most trusted advisor and to deliver the highest quality client experience.<sup>1</sup>



### TOP U.S. WEALTH MANAGER

Atlantic Trust was named The Top U.S. Wealth Management Firm by The Luxury Institute, scoring the highest among 35 private wealth management firms in the survey. The survey measured four separate indices: quality, exclusivity, social status and self-enhancement.<sup>2</sup>

The research also revealed several key differentiators about the firm and our clients:

- Atlantic Trust ranked first as being the firm that is most **unique and exclusive**.
- Atlantic Trust ranked first for having **clients who are admired and respected**.
- Atlantic Trust is **worthy of a significant price premium** and is among two firms wealthy consumers are likely to **recommend** to people they care about.

### BEST OVERALL CLIENT SERVICE

Atlantic Trust was recognized by *Private Asset Management (PAM)* magazine as the **Best Private Wealth Manager in Overall Client Service** among firms with more than \$5 billion in assets under management.<sup>3</sup>

An independent panel of industry experts selected Atlantic Trust based on outperformance in four key areas: financial progress and stability, growth in number of clients and internal hires, client satisfaction and industry innovation. *PAM* described Atlantic Trust as having **successfully serviced high-net-worth individuals in an increasingly complex economic environment** and proved to have **true ability in all seasons**.

<sup>1</sup> Data as of September 30, 2011.

<sup>2</sup> The Luxury Institute, a New York-based research firm, conducted research among 500 pentamillionaires (defined as wealthy consumers with a minimum annual income of \$200,000 along with a minimum net worth of \$5 million) about their opinions of luxury brands. For more information, visit [www.luxuryinstitute.com](http://www.luxuryinstitute.com).

<sup>3</sup> Of the five firms shortlisted for the *Private Asset Management* rating, Atlantic Trust was the only firm selected for the award. For more information, visit [www.pammagazine.com](http://www.pammagazine.com).

## BLOOMBERG'S TOP FAMILY OFFICES

Atlantic Trust placed in *Bloomberg's* annual "Top Family Offices Ranking." The survey ranked 130 money management firms by assets under management (AUM) for multi-generational families, including comprehensive investment and non-investment services.<sup>4</sup>

Ranked by AUM (\$ billions)	
HSBC Private Wealth Solutions <sup>A</sup>	\$102.0
Bessemer Trust	44.5
UBS Wealth Management	34.0
Wilmington Family Office <sup>B</sup>	26.5
Wells Fargo Family Wealth	21.0
Hawthorne PNC Family Wealth <sup>C</sup>	19.6
Genspring Family Offices <sup>D</sup>	19.5
Glenmede	19.2
Harris MyCFO <sup>E</sup>	18.3
Network Services PTE	17.0
<b>Atlantic Trust<sup>F</sup></b>	<b>14.8</b>
Oxford Financial Group	10.4
Veritable Investment Consultants	10.1
Silvercrest Asset Management	9.2
Tag Associates	6.7
Banque Heritage	6.2
Tiedemann Wealth Management	6.2
Commerce Trust <sup>G</sup>	6.0
Ballentine Partners	5.8
BBR Partners	5.3

<sup>A</sup> Only families with more than \$50 million are included, <sup>B</sup> A unit of Wilmington Trust owned by M&T Bank, <sup>C</sup> A unit of PNC Financial, <sup>D</sup> Affiliate of SunTrust Banks, <sup>E</sup> A unit of Bank of Montreal, <sup>F</sup> A unit of Invesco, <sup>G</sup> A unit of Commerce Bancshares

## BARRON'S TOP PRIVATE BANKS

Atlantic Trust was chosen as one of *Barron's* "Top Private Banks." Atlantic Trust Private Wealth Management includes Atlantic Trust Company, which functions as a limited-purpose national trust bank with \$9.4 billion in AUM.<sup>5</sup>

Ranked by AUM (\$ billions)	
JPMorgan Private Bank	\$450.0
U.S. Trust	156.9
BNY Mellon Wealth Mgmt	142.1
Wells Fargo Private Bank	132.0
Northern Trust	126.2
Bessemer Trust	65.3
Citi Private Bank	62.9
SunTrust Private Wealth Mgmt	54.4
PNC Wealth Mgmt	43.4
Deutsche Bank Private Wealth Mgt	41.3
U.S. Bank Wealth Mgmt	34.5
BMO Harris Private Bank	29.3
HSBC Private Bank	24.6
Glenmede	18.5
City National Bank	14.8
Wilmington Trust	12.8
Brown Brothers Harriman	11.1
Fiduciary Trust	10.8
<b>Atlantic Trust</b>	<b>9.4</b>

The Luxury Institute and *Private Asset Management* ratings may not be representative of any one client's experience, because the rating reflects an average of all, or a sample of all, of the experiences of Atlantic Trust's clients. Any reference to a ranking, a rating or an award provides no guarantee for future performance results and is not constant over time. Atlantic Trust Private Wealth Management includes Atlantic Trust Company, a division of Invesco National Trust Company (a limited-purpose national trust company), and Stein Roe Investment Counsel, Inc. (a registered investment adviser), both of which are wholly-owned subsidiaries of Atlantic Trust Group, Inc. This document is intended for educational purposes only and the material presented should not be construed as an offer or recommendation to buy or sell any security. Concepts expressed are current as of January 2012 and may change without notice. To the extent that information contained herein is derived from third-party sources, although we believe the sources to be reliable, we cannot guarantee their accuracy.

Investment Products Offered are Not FDIC-Insured, May Lose Value and are Not Bank Guaranteed. For Public Use.

## BARRON'S TOP WEALTH MANAGERS

Atlantic Trust again was named to *Barron's* "2011 Top Wealth Managers," which ranked firms by AUM for clients with accounts of \$5 million or more.<sup>6</sup>

Ranked by AUM (\$ billions)	
Bank of America Global Wealth & Investment Bank	\$803.0
Morgan Stanley Smith Barney	643.0
JP Morgan	450.0
Wells Fargo and Company	377.0
UBS Wealth Management	315.0
Fidelity	173.0
BNY Mellon Wealth Management	142.1
Northern Trust	128.2
Charles Schwab	113.0
Citigroup Global Markets*	66.9
Deutsche Bank Private Wealth Management	64.0
Credit Suisse	63.1
Bessemer Trust	56.8
Suntrust Banks	54.4
PNC Wealth Management	43.4
U.S. Bank Wealth Management	35.9
Barclays Wealth	33.2
Rockefeller Financial	30.0
BMO Harris Private Bank	29.3
Raymond James Financial	26.7
Neuberger Berman	25.4
HSBC Private Bank	24.6
RBC Wealth Management	19.7
Glenmede	18.5
Genspring	17.1
LPL Financial	17.0
City National Bank	14.9
<b>Atlantic Trust</b>	<b>14.5</b>
Fifth Third Private Bank	11.5
Wilmington Trust	11.5
Brown Brothers Harriman Private Wealth Management	11.1
Fiduciary Trust Company International	10.8
Veritable	10.4
William Blair & Co.	9.8
Brown Advisory	9.3

\* Includes Citi Private and Personal Wealth Management.

<sup>4</sup> *Bloomberg*, "Top 50 Family Offices." *Bloomberg Market Magazine*, August 8, 2011. "Ranking the Top Family Office: How We Crunched the Numbers," *Bloomberg* surveyed more than 1,000 money management firms worldwide, Institutional accounts and pensions excluded, data as of December 31, 2010. For more information, visit [www.bloomberg.com/news](http://www.bloomberg.com/news).

<sup>5</sup> *Barron's*, "Top Private Banks Thriving in the Tumult," December 3, 2011. Ranking is as of June 30, 2011. For more information, visit [www.online.barrons.com](http://www.online.barrons.com). For your information, Atlantic Trust Private Wealth Management includes Atlantic Trust Company, a division of Invesco National Trust Company (a limited-purpose national trust bank), and Stein Roe Investment Counsel, Inc. (a registered investment adviser), both of which are wholly-owned subsidiaries of Atlantic Trust Group, Inc. \$9.4 billion is representative of Atlantic Trust Company's total assets managed for client relationships with \$5 million or more. Total assets under management for Atlantic Trust Private Wealth Management were \$17.6 billion as of 6/30/2011. Our bank entity does not accept demand deposits or make commercial loans, so we do not bear many of the risks and conflicts of interest inherent in commercial lending institutions.

<sup>6</sup> *Barron's*, "Top 40 Wealth Managers," September 19, 2011. Ranking is as of June 30, 2011. For more information, visit [www.online.barrons.com](http://www.online.barrons.com).

<b>Atlanta</b> 404 881 3400	<b>Boston</b> 617 357 9600	<b>Houston</b> 713 214 7640	<b>San Francisco</b> 415 433 5844
<b>Austin</b> 512 651 7800	<b>Chicago</b> 312 368 7700	<b>Newport Beach</b> 949 660 0080	<b>Washington, D.C.</b> 202 783 4144
<b>Baltimore</b> 410 539 4660	<b>Denver</b> 720 221 5000	<b>New York</b> 212 259 3800	<a href="http://www.atlantictrust.com">www.atlantictrust.com</a>

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PRIVATE WEALTH MANAGEMENT