

THE ATLANTIC TRUST ADVISOR



Opportunity Abroad: In addition to the compelling growth story, emerging markets now show improving fiscal trends and rising foreign exchange reserves.

Expanding the Search for Income

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"May you live in interesting times." This ancient Chinese saying may sound rather benign, even like a blessing, but it's considered to be a curse. And the modern translation could be: Thanks, but as an investor seeking some stability and income, I'd rather it not be so interesting. So, how do you position a portfolio for income in a low-yield environment? Think: opportunistic and tactical—within an expanded investment universe.

Today's interesting times include some extraordinary data points: The recession of December 2007 to June 2009 was the second-longest in history (and the official "end" is debatable); stock yields approximate bond yields for the first time since the 1950s; the U.S. government has a \$1.3 trillion deficit; and the current recovery bears little resemblance to historical post-recession recovery patterns.¹ For many fixed income investors, their standard benchmark is depressingly low: In December, the yield on a 10-year Treasury was 3.30% (barely compensating investors for inflation);² just over 3 years ago, it was 5.02%.³ These factors have clients seeking income feeling squeezed: Stay with the known and the "safe" and pay today's high price for safety—very low yields—or take more risk and increase yield.

"When we talk about risk, a major risk right now is **reinvestment risk,**" says Dave Donabedian, CFA, chief investment officer. "If you have maturing bonds and reinvest them at today's rate, the income stream from the portfolio is going to drop precipitously. A 5-year Treasury with an interest rate of 5% rolled into a new bond will earn you slightly less than 2%, and it's hard to see the value in owning a 2-year Treasury with slightly more than 1.00% yield. There's a similar pattern in the municipal bond market. In addition, the recent quantitative easing of the Federal Reserve increases the odds that investment grade interest rates will stay at very low levels for the foreseeable future."

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ATLANTIC TRUST

PRIVATE WEALTH MANAGEMENT

And, notes Bryan Reilly, senior vice president and equity analyst, the yield picture for large-cap stocks, a traditional avenue for income through dividends, currently is not very attractive. The S&P 500 dividend yield is 1.96% (remember the 1980s, when dividends sometimes topped 6%?).² “Due to reinvestment risk, value and clients’ desire for income, we’re casting a wider net for income through an **enhanced yield strategy**,” says Donabedian. “There’s a strong case to be made for diversifying a portfolio’s sources of income but with tactics that don’t unnecessarily increase risk.”

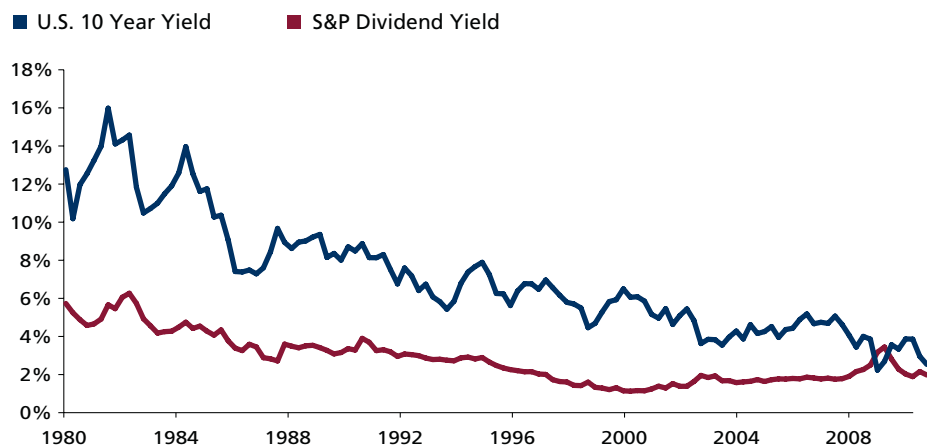
Taking Advantage of Emerging Markets

Enhanced yield falls into the Atlantic Trust “tactical and opportunistic” segment of the asset allocation matrix. The other segments are traditional equities—U.S. large-cap, U.S. mid- and small-cap, and non-U.S.—and bonds, cash, private equity and hedge funds. It’s important to remember that strategic asset allocation is the primary driver for long-term investment success, notes Jeff Thomas, CFA, vice chairman. “Asset allocation has taken a lot of knocks in the past several years,” says Thomas. “But it will always be powerful. We start there, and then modify tactics based on the investing and economic environment.”

Global equity is always part of the recommended asset allocation mix, in large part because of the long-term potential of emerging markets. Significant GDP growth in emerging countries—particularly China, India, Indonesia and some South American and south-central African countries—is far outpacing that of developed countries, with growth rates of 10% or more. Ten years ago, spending by consumers in emerging markets was 22% of the global total—today, it’s 35%; consumers in emerging markets were buying 10 million cars a year—today, it’s 27 million.⁴

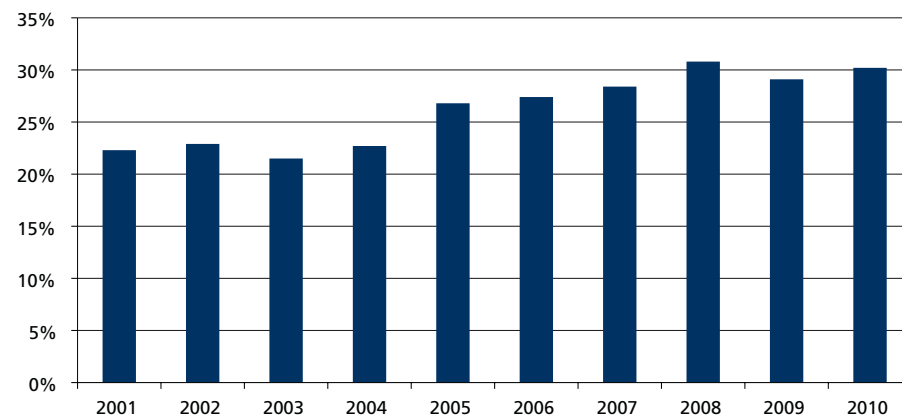
In 2009, Atlantic Trust raised its recommended emerging market equity

Diminishing Yield from Traditional Sources



Source: Strategas, data as of September 30, 2010

S&P 500 Companies: % of Sales from Outside U.S.



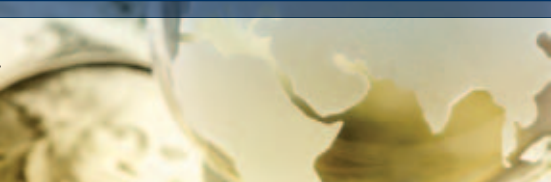
Source: Bank of America/Merrill Lynch Research Group, data as of December 2010

exposure because of the compelling growth story. Now, because of improving fiscal trends and rising foreign exchange reserves, clients can benefit from direct exposure to emerging markets through debt as well as equity investments, according to Donabedian. “Sovereign credit quality is increasing and yields on bonds across emerging markets are averaging about 6.37%.⁵ Indirect exposure from commodities and U.S. large caps with significant global business, particularly in emerging markets, can also boost a portfolio’s return.” From 2000 to 2009, the percentage of sales and profits from non-U.S. operations of the S&P 500 grew dramatically—from 25% to 33%

and 31% to 54%, respectively. “While the average currently stands at 30.2% for the S&P 500, there are many companies with more than 50% of revenues sourced from abroad,” notes Patrick McLaughlin, vice president and senior investment analyst. “As of December 14, Intel generated 85% of revenues abroad while Exxon Mobil generated 77% abroad and Coca-Cola, 73%.⁶”

Alternatives to Traditional Fixed Income

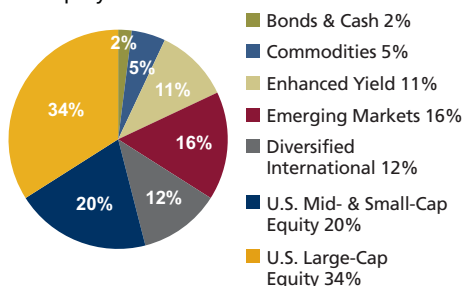
It’s important to remember that “there’s no free lunch” in fixed income, says Gary Pzegeo, head of fixed income. One of the trade-offs to generate higher income



is to be more flexible on credit risk. As corporations improved their balance sheets in 2009 by generating excess cash, credit risks for high-yield corporate bonds eased, and Atlantic Trust's opportunistic move into a higher recommendation for high-yield corporate bonds paid off. Yields dropped in 2010 and the more attractive opportunity now is a diversified portfolio of **bank loans**, a new strategy for Atlantic Trust. Bank loans carry floating rate coupons and have very little duration risk, as interest rates are typically reset every three months, which makes them attractive for investors seeking a hedge against interest rate risk inherent in other fixed income investments. In addition, loans sit at the top of a company's "capital food chain," with higher recovery rates than high-yield bonds. "With a yield of about 5%, very favorable relative to Treasuries and even the AAA municipal bond market, this strategy now carries an equal weighting with emerging market debt in the enhanced yield segment of our asset allocation matrix," says Pzgeo.

A Diversified Portfolio

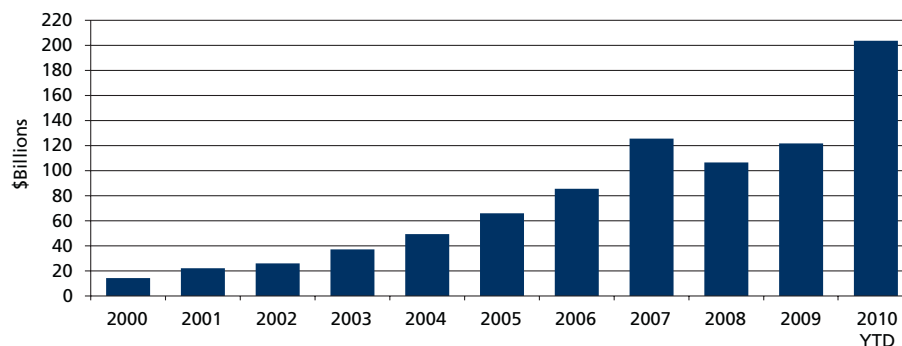
Atlantic Trust Model Recommendations for Equity Allocation



Source: Atlantic Trust, November 2010

Atlantic Trust's enhanced yield recommended allocation also includes two new externally managed strategies with a demonstrated track record in **equity income**. One, a classic hybrid strategy, includes a customized portfolio of REITs,

A Decade of Growth in MLPs



Source: U.S. Treasury, Bureau of Economic Analysis, December 31, 2009

utilities and carefully chosen common stocks with strong international sales. The other identifies and selects high-yielding stocks around the world that are growing their dividends. While this strategy is 100% exposure to equities, it's less volatile than a broad market index fund and offers significant diversification within its niche, says Reilly. "Because of these managers' ability to select equities yet also mitigate risk, there's not a direct relationship between adding equities and adding risk," says Reilly. "This is a very thoughtful approach to increasing equity exposure. For these new equity income strategies, we reviewed at least 10 managers and selected the 2 that fit our stringent risk-return criteria."

Master Limited Partnership (MLP)

strategies have a recommended equal weighting with equity income in the enhanced yield category. MLPs provide an attractive total return proposition supported by a current 6.3% yield plus a healthy growth rate in the distribution payment.⁷ "Growth prospects for the MLP industry continue accelerating due to shifts in supply and demand trends in the energy industry, requiring significant spending on infrastructure," says Adam Karpf, CFA, MLP portfolio manager. "The risk adjusted return profile for MLPs is compelling due to the high-quality businesses generating consistent growth in cash flows, which is demonstrated by the sector's tremendous distribution growth track record."

Intelligent Stewardship

Some Atlantic Trust clients rely heavily on portfolio income to continue funding current family obligations, philanthropic goals or education trusts. Others are less dependent on current income. But regardless of the portfolio objective, intelligent stewardship of assets is critical. "The future is not always what we expect it to be, so the best portfolio strategy is to be flexible," says Thomas. "Our view is that the better the decisions on how to allocate capital, the harder those assets will work—preservation in down markets and growth in up markets. It's very normal to dislike the current low-yield environment, but taking advantage of opportunities to overcome it is really proper stewardship of wealth."

* International Monetary Fund, April 2010 World Economic Outlook

1 U.S. Treasury, deficit as of November 30, 2010.

2 Bloomberg, L.P., data as of November 30, 2010.

3 Bloomberg, L.P., data as of June 30, 2007.

4 Source: International Strategy and Investment (ISI); data as of November 30, 2010, with December 2010 data projected.

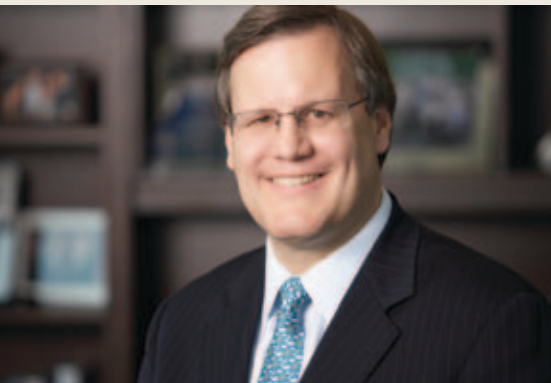
5 Source: JPM GBI-EM Diversified Index as of November 30, 2010.

6 Bank of America/Merrill Lynch Research Group, data as of December 2010.

7 Source: Alerian MLP Index, data as of December 1, 2010.

Vital Signs and Building Blocks

Record growth, the virtuous circle, the expert view, a culture of listening. It's all part of becoming—and staying—the most client-driven wealth management firm in the business, says Atlantic Trust's chairman and CEO, Jack Markwalter.



Q Please give us a high-level overview of Atlantic Trust in 2010, including what you view as the firm's most significant accomplishments.

A It was an extremely productive and eventful year for the firm in many ways. First, we delivered very competitive investment performance to clients. Because of the outstanding work by our investment team and their tactical approach, primarily through innovative fixed income and niche market opportunities, we protected clients' wealth and grew it through 2010, according to clients' objectives. Managing money is at the core of our business, yet we also integrate it with financial, trust, estate and philanthropic planning to address the full spectrum of our clients' needs. This is the essence of holistic wealth management, which is the hallmark of our firm.

Another achievement during the past year has been our record growth. Throughout the recent market downturn, we've grown at an accelerating rate—we just passed 14 straight quarters of net positive flows, and in 2010 we added approximately \$1 billion in new assets under management. We are pleased with the fact that more than 75% of our new business comes from referrals. We've

seen significant referrals from existing clients and intermediaries, such as attorneys and CPAs—clients are asking them for advice on moving away from competitors, such as large commercial banks and brokerage firms. Atlantic Trust's fiduciary business model better aligns the interests of our firm with our clients.

Q How does growth of the firm affect clients and team members?

A It's the virtuous circle that we have frequently mentioned this year. Growth allows us to continue investing in our business, specifically our investment platform, our client services and, importantly, our people. Ongoing investment back into our business enables us to continuously improve all the aspects of the equation, which leads to further growth.

In 2010, we have emphasized career path enhancement and continuing education for our employees. Our philosophy is to fully engage employees on all levels—it provides continuity of service to clients and essentially makes our employees part of the "solution"—and that's reflected in our high employee retention rate. We want our clients to know that we're committed to making Atlantic Trust the most highly desired place to be if you're an experienced wealth management professional. Our culture and value proposition attracted 14 new senior hires in 6 separate offices in 2010. Wealth management is a people and relationship business, and skilled professionals want to be with a winner. We're happy to say that's being borne out here.

Q You talk a lot about the client experience at Atlantic Trust. What do you mean by that?

A The client experience is a range of things that reflects what it means, even what it

"feels like," to be an Atlantic Trust client. Part of it is investment performance, but it also includes the look, feel and ease of use of our client website, the clarity of statements, access to timely information and the responsiveness of our employees. Continually enhancing our client experience remains at the top of our agenda for 2011. Because of this, we hired a senior professional, Logan Allin, as head of strategy and client experience. Logan is taking a strategic view of improving our client experience, including new, advanced technology and upgrades to our operations platform. Clients today want a rich and robust information offering, but they also want the ability to use information relevant to their life and goals. They want it to be extremely client-friendly and available on a timely basis. The world is changing rapidly and, for many clients, a monthly statement or quarterly meeting just isn't enough or as meaningful as they'd like. We want to be ahead of the curve in providing analysis of their portfolios and wealth plans.

Q You and your executive team held more than 25 client events across the country in 2010. How did this fit into your overall strategy?

A At the beginning of 2010, we made the decision to be very proactive in personally engaging with as many clients as possible in our 11 offices through a series of events. I traveled about 60,000 miles this past year to meet with clients and friends of the firm, and it was well worth it. I had the privilege of meeting and talking with so many clients that I ordinarily don't interact with, but the real benefit for them was the chance to hear from both internal and external investment and wealth planning experts at the events. That's a highlight of our boutique culture—the ability to

VIEWS FROM THE TOP

In 2010, how did Atlantic Trust demonstrate its “brand promise”? How is that being carried forward into 2011?

“It was a record year for new clients and new assets, due primarily to our position as an objective, trusted advisor. We’re very fortunate to have a deep wealth planning platform, a forward-thinking investment team and a stable corporate parent in Invesco. All of these are attracting highly qualified professionals to our firm, for the benefit of our clients. We fully expect this virtuous circle of growth to continue in 2011.”

—*Eric Propper, CFA,*
President and COO

“In a year of almost extreme uncertainty—the tax environment, the economy, the elections—the Wealth Strategies Group helped clients navigate tactically and stay focused on their long-term goals. We advised many clients on taking advantage of specific opportunities, such as Roth conversions and gifting strategies, which responded to the 2010 environment. We’ll continue to position our clients for opportunities in 2011 and help them plan for non-tax legacy issues using timeless strategies that embody the essence of ‘family wealth.’”

—*Linda Beerman,*
Chief Fiduciary and Risk Officer



Atlantic Trust's executive team at Invesco's global headquarters in Atlanta. Front L to R: Linda Beerman, Ken Kozanda; Back L to R: Dave Donabedian, Jack Markwalter, Eric Propper

“In what proved to be another challenging year, all of our internal and approved outside manager strategies, across all asset classes, finished 2010 in positive territory. The Asset Allocation Committee added value to client portfolios by emphasizing recommendations in strong-performing areas, such as emerging market equities and debt, commodities and master limited partnerships. In 2011, we will continue to be vigilant in assessing macro risks around the globe and to work to identify strategies that can improve risk-adjusted returns.”

—*Dave Donabedian, CFA,*
Chief Investment Officer

“Improving the client experience is a central theme in all that we do. We listen carefully to both our clients and our client service teams to be sure we are focusing on tools and resources that are most meaningful to them. Investment in our platform occurs in many ways, but one of the most important and visible ways is through our technology. In 2011, clients can look forward to several enhancements, including an improved website and reporting capabilities.”


—*Ken Kozanda,*
Chief Administrative Officer

give clients access to experts inside and outside of our firm. We want clients to hear directly from them—they represent some of the best thinking and best solutions in the industry. In the past, we did fewer, larger events, often tied to a cultural or philanthropic event. But it's important to clients to understand more about what's happening in the world. They want to hear expert views on the economy, the markets, taxes and the geopolitical situation, and how this is affecting their portfolios and our wealth management strategies for them. The events exceeded our expectations in every way, and we have more planned for 2011.

Q What did you learn from talking with so many of your clients?

A It proved to me how engaged our clients want to be with the bigger picture, that they're highly interested in strong, intellectual content. It was very satisfying to see clients asking such thoughtful questions of our executives and our outside experts. For us, it reinforced the theme and philosophy for our firm: We want to be the most client-driven wealth management firm in the business, constantly in conversation with our clients, knowing them on a deep level and getting feedback from them regularly. If you think about the most successful, customer-centric companies—Apple is one that comes to mind—they are relentless

in focusing on what their customers want. They listen, they respond.

We talk about being a *trusted advisor* for our clients, and that means listening and acting in a client-centric way. It's our culture. There's nothing more stimulating than being out there and finding out what your clients are thinking. I encourage clients who want to continue the conversation or have follow-up questions to get in touch with me directly: jmarkwalter@atlantictrust.com or 404.881.3400. We very much appreciate the trust you place in us and look forward to further growing our relationship with you in 2011. 

The “C” Suite: Serving Multi-Generational Families

A center for stability, technical expertise and family leadership, the multi-family office concept describes Atlantic Trust’s philosophy and services. And so does one word: custom.

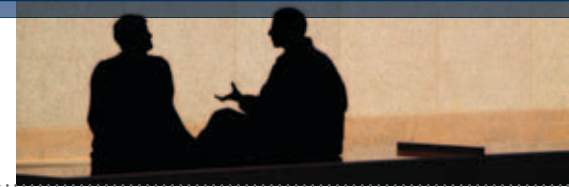
What’s the difference in a 23-year-old client who wants to make her mark on the world and her 79-year-old grandfather who already has made his mark on the world? Although this relationship may span 56 years of age and include very different levels of wealth maturity, to Atlantic Trust they’re one and the same: a client who needs a highly personal relationship with highly customized services specific to an individual situation. The 23-year-old’s *immediate* needs may cover only a small slice of the wealth management spectrum—What should my budget look like?—but her longer-term needs will include understanding her “place” in the family. The 79-year-old’s needs cover almost the entire spectrum—What does wealth mean to this family and what will the family legacy look like? Both require the breadth and depth of a team of trusted advisors focused on counseling, guiding, planning and managing wealth.

This comprehensive, multi-faceted team approach to wealth management is the cornerstone of what is commonly known as a multi-family office. The Family Office Exchange (FOX) defines a multi-family office as “a center of influence and stability to help families with exceptional wealth ensure the preservation and growth of their financial assets and family heritage. . . MFOs have historically provided customized service levels and confidentiality not available from larger, product-driven financial institutions.”* As a multi-family office, Atlantic Trust’s breadth of services for the ultra-affluent includes: investment management; tax, retirement, philanthropic, estate and legacy planning; entity management; customized reporting and

finding solutions to the range of financial issues presented by a client, customized to a specific client family’s needs. Often, and certainly given the financial downturn of 2008-2009, the need for expert, sophisticated investment management seems to trump the broader picture of the complexities of managing wealth. But the broader picture—which includes multi-generational wealth transfer planning and family-business succession planning—is the reason wealthy families turn to Atlantic Trust for a long-term relationship. “It requires the ability to look across entities, generations and asset classes,” says Scott Thompson, managing director and senior relationship manager in the Atlanta office. “Our relationships with clients often must consider both personal and business wealth and must *always* be attuned to changing family dynamics. Ultimately, it’s the ability to provide skills, knowledge and capabilities, instead of only products and services, that our clients rely on.”

Supporting Family Visions

The concept of a family office dates to the model established in 1882 by John D. Rockefeller—one entity to manage one family’s vast fortune, but also to maintain a sense of family cohesiveness and continuity. Today’s multi-family offices, such as Atlantic Trust, have evolved to serve multiple clients at varying levels of wealth whose primary goals include wealth preservation, stewardship and legacy. The primary benefit for a family is increased effectiveness of its wealth management, from a holistic-oriented multi-disciplinary team, and a sustainable way to ensure generational unity. “It would be hard to overemphasize the need for a ‘trusted advisor’ when describing what we do,” says Thompson. “It encompasses everything from a very granular view of the family’s assets, trusts, risk protection and legal entities to helping the family consider and articulate its mission and vision.”



The ultra-high net worth client relationship often includes numerous households and multiple generations and must acknowledge and respect generations’ different points on the wealth maturity curve. While members of the first generation rely on Atlantic Trust to develop plans for transferring wealth down in a tax-efficient way, they are often equally focused on transferring a legacy of principles and values to the succeeding generations. “In some cases, our most important role is transitioning a son or daughter into the position of family leader and steward of the vision *and* the assets,” says Eric Riak, CFP®, managing director and senior relationship manager in Boston.

*“Our relationships with clients often must consider both personal and business wealth and must **always** be attuned to changing family dynamics. Ultimately, it’s the ability to provide skills, knowledge and capabilities, instead of only products and services, that our clients rely on.”*

At the request of the patriarch, Thompson recently spent time with the second generation of an affluent family—specifically, an adult child about to be married. It was important to the father that the new couple have a more complete understanding of the family’s wealth, most importantly how the family practices stewardship of wealth. “It was a real privilege to play this role,” says Thompson. “Beyond the practical considerations of budgeting and the like, the father asked that I help communicate the family’s views on responsibly caring for wealth and its meaning to them.”



A SOLID FOUNDATION



Whatever the primary objective, the integrated plan is unique to each client and follows a thorough “diagnostic” process that can take from several months to a year and is updated regularly as the family’s circumstances change. “We can only do our jobs exceptionally well if we understand exactly what the client wants,” says Riak. “One may have a primary and immediate desire for restructuring complex partnerships and valuing business interests, while another may be focused on trusts for the purpose of grandchildren’s education.” A critically valuable role that Atlantic Trust plays is identifying services that need to be outsourced—life and property and casualty insurance, for example—and then selecting and managing the outside advisor, as well.

In a Word: Help!

While management of more routine financial matters is vexing for most people, ultra-wealthy families often have a more pressing need—because of time constraints, heavy travel and the layered complexities of both personal and business wealth—for an advisor to take over for them. Sometimes the request for a service can come in a phone call on the weekend—a highly desired property is suddenly available or a family business urgently needs an expanded line of credit. And sometimes the service request comes in a package in the mail—bills are due and the family has decided to relinquish this duty. “Our role includes helping a family take care of the things they might otherwise do on their own if they weren’t so busy, including negotiating purchases, securing an attractive mortgage and managing relationships with other service providers, such as their CPA for tax return preparation,” says Julia Beisel, director of client administration. “Handling their expenses also gives our relationship managers a better understanding of cash flow.”

The Family Office Exchange (FOX) is a clearinghouse for best practices on the business of managing family wealth. FOX defines a successful multi-family office as having these characteristics:

- Objective financial advice—no conflict of interest in goal alignment; distinction between financial advice and product selection; sophisticated decision-making process
- Creative solutions to financial problems—broad array of sophisticated strategies and services; integration of complex financial goals; team of skilled, multi-disciplinary professionals
- Delivery of complex services in a consistent manner—process to deliver a high quality of services; integrated reporting for better decision-making; value-added delivery on an annual basis
- Ability to offer relationship pricing across the family group—each household with separate financial goals; collective application of key planning techniques; willingness to take a long-term view toward client relationships

Atlantic Trust reflects these characteristics of a successful multi-family office, but it’s also important to remind clients of the firm’s fiduciary status, says Linda Beerman, chief fiduciary and risk officer for the firm. “The definition of fiduciary requires the consideration of clients’ interests ahead of the firm’s interests and the responsibility to exercise care with clients’ assets,” says Beerman. “Serving clients through a multi-family office structure requires us to know a great deal about many complex issues, yet our real value is from thoughtful, expert counsel as a fiduciary.”

Helping clients understand where they stand financially is also a critical part of Atlantic Trust’s family office services. Although most clients don’t want reporting “overkill,” says Beisel, they do want reports that are meaningful and customized to them. “We spend an extraordinary amount of time customizing reports for clients, from cash flow and expense reports to investment performance reporting in a wide variety of formats.” Some clients need true “concierge” services—research on leasing aircraft, oversight of property management for multiple homes or a detailed plan for donating an art collection. Beisel and team members had a client who wanted to donate an extensive sculpture collection. “It’s more complex than it seems,” says Beisel. “You can’t always

just donate the art to a museum; often, the donor must fund an endowment to support the collection’s maintenance.”

Clients do expect a trusted advisor to exercise a high level of discretion on their behalf, but, says Thompson, the “lead” ultimately comes from the client. “One principle we always take away from our relationships with clients is this: If we really listen to our clients, they will tell us how to do our jobs.” 

In the next issue of The Advisor, we’ll focus on the services Atlantic Trust provides for family businesses.

* Source: *What Is a Multi-Family Office (MFO)?* Family Office Exchange, www.foxexchange.com

Atlantic Trust Attracts Top Talent



NEW OFFICE IN NEW YORK

In 2010, Atlantic Trust invested in regions across the U.S. where we already have a strong presence and see potential for building our business. We also made key hires to further strengthen our Investment Team and Wealth Strategies Group. In the fourth quarter, Jeff Jacobs joined the Chicago office as a managing director and director of business development. Additionally, in Boston, Sid Nargundkar, CFA, joined as a vice president and equity analyst for the firm's Disciplined Equity team, and Chris Flynn has joined as an associate vice president and associate relationship manager.

These and other strategic moves contributed to Atlantic Trust's record growth in 2010, as clients and intermediaries sought out advisors with a fiduciary mindset, high-touch client service and an investment approach that aligned with their objectives. Attracting top talent and reinvesting in our business will continue to be areas of focus in 2011, as we remain committed to building relationships of trust with our clients, which is the foundation of our success.

In November, Atlantic Trust combined its two New York offices into a central location at **1177 Avenue of the Americas**.

"Moving to a centralized office gives Atlantic Trust greater critical mass and better positions us to continue to grow our presence in New York and the surrounding areas," said Jack Markwalter, chairman and CEO. "I'm pleased to see these teams come together in our new office under the excellent leadership of President and COO Eric Propper and Managing Director Marc Keller."

Propper and Keller have led Atlantic Trust's positive momentum in New York—including 15% growth in assets under management (AUM) since January 2009. With \$3.5 billion in AUM (as of October 31, 2010), the combined New York team has 12 senior wealth advisors with an average of 29 years of experience managing client relationships.



Mark Frazier, CFA
Associate Vice President
Relationship Manager
Austin



Maria Hanlon
Vice President
Relationship Manager
Boston



Sid Nargundkar, CFA
Vice President
Investment Analyst
Boston



Clayton Santimoro, CIAA
Vice President
Investment Analyst
Boston



Chris Flynn
Associate Vice President
Relationship Manager
Boston



Christine Lucero, CFP®
Associate Vice President
Wealth Strategist
Boston



Jeff Jacobs
Managing Director
Business Development
Chicago



Ryan McCleary, CFA
Senior Vice President
Relationship Manager
Houston



Adam Karpf, CFA
Senior Vice President
Co-Manager, MLP
New York



Gordon Ross
Vice President
Relationship Manager
New York



Logan Allin
Managing Director
Head of Strategy
& Client Experience
Newport Beach



Aaron Newland, CFP®
Vice President
Business Development
Newport Beach



Jeffrey Dillman, CFA
Managing Director
Relationship Manager
Washington, D.C.



Steven Smith
Managing Director
Relationship Manager
Washington, D.C.

View biographies for all of Atlantic Trust's senior professionals on www.atlantictrust.com

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