

Silver Bridge



For Immediate Release
Contact: Pam Sullivan or Dan Dent
Bishoff Communications
617-573-0076

Silver Bridge expands nationally, to the West Coast, and formally launches Silver Bridge Family Office Partners, a boutique dedicated exclusively to serving the wealth management needs of complex and sophisticated families and family offices.

BOSTON, MA (July 20, 2010) – Silver Bridge, an independent wealth advisory firm that provides thoughtful, integrated wealth management solutions, announces it has agreed to acquire H&S Financial Advisors (“H&S”), a San Francisco-based wealth advisory boutique. Martim de Arantes Oliveira, the former head of H&S, will run the West Coast operation for Silver Bridge, as Regional Director, with a focus on multi-generational and entrepreneurial wealth. Oliveira, who has over 20 years of global experience serving the needs of wealthy families, says, “Our combination with Silver Bridge Advisors reaffirms our commitment to the highest standards of integrity, quality and professionalism in the delivery of wealth management services. I am excited to be a part of a premier organization.” Steve Proitano, President at Silver Bridge Advisors, says, “Martim’s experience and complete focus on clients’ best interest echoes the long-held values of Silver Bridge.” Tom Manning, Chief Investment Officer at Silver Bridge, adds, “Under Martim’s leadership, we can extend our deep resources and wealth management expertise to the Northern California region.” Atlantic State Partners, LLC, an investment banking firm focused on the financial services industry, advised Silver Bridge on the transaction.

Simultaneous with the acquisition of H&S, Silver Bridge will launch **Silver Bridge Family Office Partners**, a boutique dedicated exclusively to the needs of complex and sophisticated families and family offices. Silver Bridge Family Office Partners is led by Allison Taff, a Principal at Silver Bridge, who joined the firm from Fidelity Family Office Services and has extensive experience working with family offices of all sizes. Taff was hired to complete the build-out of the firm’s family office offering which included enhancing its products, resources, and service-model. “The launch of this business signifies our firm-wide commitment to working collaboratively with families, their advisors and family office professionals, all seeking help from a partner they can trust to recommend truly objective, customized solutions,” says Proitano.

Family Office Partners works with a wide range of clients, including families who need help building and designing their own family office as well as those seeking alternative ways to manage family wealth without establishing their own family office. Additionally, the firm works in concert with formalized family offices by offering specialized consulting services and outsourced solutions to help them effectively sustain their practice, minimize overhead expenses, and gain insight into industry best practices. A specific focus of this business will be to introduce a unique, proprietary technology and reporting platform that helps to facilitate more effective communication among advisors and enable better decision making. “The name Family Office Partners reflects our deep understanding of the unique needs of this community of families who have a strong desire to find trusted partners to help them solve problems in a flexible and consultative manner, absent of personal agendas,” says Taff.

Both Oliveira and Taff will report to Steve Proitano, President. The H&S acquisition is expected to close on August 31, 2010. The firm’s assets under advisement after the close will be approximately \$2 billion.

About Silver Bridge Advisors

For more than 80 years, Silver Bridge has been focused on helping individuals and families realize their financial goals and aspirations. As an independent wealth management firm that is owner managed, our advisors’ interests are aligned with our clients’ needs. We offer objective, thoughtful advice and customized solutions that integrate each individual’s or family’s investment, philanthropic, tax, and wealth transfer objectives. All investment advisory services are provided through Silver Bridge Capital Management, LLC, a registered investment advisor and affiliate of Silver Bridge Advisors, LLC. Silver Bridge is an affiliate of Wilmer Cutler Pickering Hale and Dorr, LLP, an international law firm. For more information about Silver Bridge, please visit us at <http://www.silverbridgeadvisors.com>.