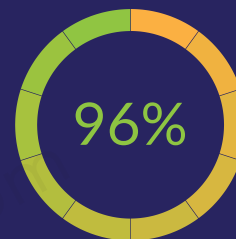


Bessemer Investment Management

TRUST SCORE



Bessemer Investment Management, federally registered in 2001, is a Registered Investment Advisor (RIA) in 1 state(s) with a licensed staff of 50 advisors. Bessemer Investment Management manages \$35 billion and provides investment advisory services for 1 clients (1:1 advisor/client ratio).

The annual fee for investment advisory services ranges from 0.35% to 1.10% of AUM.

BENEFITS

- Firm uses a transparent fee-only model
- Firm has \$1B or more in assets under management
- Firm has been federally registered for 17 years
- Communications sent to the firm's website are secure and encrypted
- Firm does not have a disciplinary history
- Firm does not have any misdemeanor convictions
- Firm does not have any felony convictions
- Firm does not have an insurance agent conflict
- Firm does not have an attorney conflict
- Firm does not accept performance-based fees
- Firm does not perform side-by-side management

CONSIDERATIONS

- There is only one licensed advisor for every 1 clients (industry average 1:50)
- Firm serves fewer than 1,000 clients
- Firm is a broker-dealer, or is affiliated with one, and may be subject to compensation-related conflicts of interest
- Firm may receive soft-dollar benefits that could incentivize them to push trades through broker-dealers that provide advantages to the firm instead of through broker-dealers that could provide the best execution for their clients
- Custodian is unknown

BENEFITS (cont.)

Firm does not privately manage or own the products they recommend

Firm does not offer proprietary products

CONSIDERATIONS (cont.)