FIELDPOINT PRIVATE®

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Wells Fargo Team Jumps to Fieldpoint Private

Jackie Green and Michael Kirkbride join ultra-high-net-worth firm's New York office.

Greenwich, CT – June 5, 2017 – Fieldpoint Private, the fast-growing wealth advisory and private banking firm serving ultra-high-net-worth families and institutions, today announced that Jackie Green and Michael Kirkbride have joined the firm as Managing Directors and Senior Advisors. Their practice is based in Fieldpoint Private's New York City office.

Ms. Green and Mr. Kirkbride began serving ultra-high-net-worth clients together while at Bank of America's U.S. Trust unit in 2010, eventually totaling more than $1 billion encompassing investments, loans and deposits. While there, the pair partnered to serve clients whose needs included custom investment portfolios, pre-sale planning for entrepreneurs, wealth transfer planning, trusteeship, and personal and institutional cash management.

After ten years with Bank of America, Ms. Green joined Wells Fargo in August 2016; Mr. Kirkbride joined her there in September. His U.S. Trust career spanned 12 years, with a focus on portfolio management for many of the firm's wealthiest client families, while also serving as the lead portfolio manager on U.S. Trust's Global Opportunities and International Focused Equity strategies.

According to Ms. Green and Mr. Kirkbride, their search for the "right next home" for their clients would prove arduous, noting their clients require the scope of services most people associate with only the giants of banking and wealth management. "Our clients need everything that the big global firms have to offer, but they need it all with more flexibility, nimbleness and, frankly, creativity than you see at the giant firms," Mr. Kirkbride said. Ms. Green added, "Every day, every colleague at Fieldpoint focuses 100 percent on the needs of wealthy families. It's not a department of a division of a subsidiary – it's who they are. The closer we looked, the more obvious it became that Fieldpoint was – and is -- the answer."

To Fieldpoint Private President and CEO Robert Matthews, the team's story parallels that of Fieldpoint Private's 31 founders, who launched the firm in 2008 at the dawn of the financial crisis, in many cases motivated by their own frustrations with the financial firms with whom they had been working. "The irony," Mr. Matthews said, "is that these were exceptionally wealthy people who had led companies like Merrill Lynch, The Home Depot and Gillette. They had every reason to expect the best our industry has to offer, and in too many cases they felt they weren't getting it."

Advisors, Mr. Matthews added, often have similar experiences. "All of us at Fieldpoint are so pleased that Michael and Jackie have found Fieldpoint. We know their clients will feel the same."

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About Fieldpoint Private

Headquartered in Greenwich, Connecticut, Fieldpoint Private (www.fieldpointprivate.com) is a boutique financial firm providing the highest degree of personalized, confidential wealth planning and private banking services. Catering to highly successful individuals, families, businesses and institutions, Fieldpoint Private offers a powerful combination of wealth management and strategy, family office, private banking and business banking services addressing every financial need for each of our clients including: wealth transfer advice, tax planning, aggregation and performance reporting, risk management, goals-based investing strategies, sophisticated investment selection, discreet and personalized banking, highly customized credit solutions, custom custody and trust solutions, highly attentive/responsive service and concierge services.

Fieldpoint Private was established in 2008 by 31 Founders with a specific vision and purpose. These extraordinary leaders of industry and community recognized the opportunity to create a financial firm totally attuned to people's individual circumstances. Our firm is built on a philosophy of exclusive membership and client-centricity. Working with a limited number of relationships gives every person the experience of belonging to an extremely selective group. The result is a new breed of institution established on the basis of personalization, responsiveness, and exclusivity, and an ensured commitment to impeccable service and consistently flawless execution. Our service approach offers a unique client experience custom crafted to each client's financial needs.

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