

Fieldpoint Private Welcomes Team from J.P. Morgan *Landmark Group manages over \$700 million for wealthy client families*

Greenwich, CT – December 18, 2017 – Fieldpoint Private, the fast-growing wealth advisory and private banking boutique serving ultra-high-net-worth families and institutions, today announced that William E. Christian, Tammi A. Lauder, Michael J. Lent and William T. Lent have joined the firm’s Greenwich, Connecticut office as Managing Directors and Senior Advisors, joined by their associate, Steven Cangialosi.

The team’s roots date back more than 40 years and encompass two longstanding partnerships. Brothers Michael and William Lent began working together at Prescott, Ball and Turben in the 1970s. They moved to Smith Barney (now Morgan Stanley) in 1993. That year, in a separate move, Ms. Lauder also joined Smith Barney, and in 1997 Mr. Christian joined the firm.

Ms. Lauder and Mr. Christian began their partnership the following year, and in 2002 they joined forces with the Lent brothers, forming the Landmark Group. In 2010 the team joined J.P. Morgan Securities in White Plains, New York.

At J.P. Morgan the team advised clients on over \$700 million in assets. Their services encompass portfolio allocation and investments, asset protection, wealth transfer and philanthropic planning, family communication, cash flow planning and credit. “We don’t specialize or standardize what we do. Our clients expect all of this and they have a right to,” said Mr. Christian.

Ms. Lauder said that as the team grew more familiar with Fieldpoint, all four were struck by the scope of the firm’s intellectual capital across all of the facets of advice that they provide. “At first we were surprised, but we realized the access Fieldpoint offered was not in spite of their boutique size, but because of it,” she said. “Now, just steps away, we have colleagues who headed investment research, private client credit, trust and wealth planning for Citi Private Bank, Smith Barney and U.S. Trust. That proximity is simply not feasible at the giant firms.”

The team also found Fieldpoint’s approach to outside money managers to be refreshing. “Firstly,” said Ms. Lauder, “They don’t have an asset management division or investment bank that uses the advisors as distributors, and they don’t accept fees from third-party money managers. That makes them unconflicted; we knew that would resonate with our clients.”



FIELDPOINT PRIVATE WELCOMES TEAM FROM J.P. MORGAN – 2/2

Mr. Christian sees a connection between the unconflicted approach and performance. “They find outstanding managers who continue to perform well over time. They help their advisors understand what makes those managers tick. And then they publish the performance of their platform for all to see,” he said. “Publishing their manager performance - I had never seen that before.”

Mr. Matthews said that the team is exactly what Fieldpoint Private’s founders had in mind when they created the firm nearly a decade ago. “Tammi, Bill, Bill and Mike represent the very peak of the profession,” he said.

“They have come from the country’s largest financial firm to one of its most intimate, in order to make sure their clients would have the access they deserve to all that they need. This might seem ironic to some, but it is incredibly meaningful to all of us, and we’re proud to count Tammi, Bill, Bill and Mike as colleagues,” said Mr. Matthews.

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.

###

