FIELDPOINT PRIVATE®

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Morgan Stanley's Schnipper Moves to Fieldpoint Private

Decision follows 25-plus year advisory career that began at Smith Barney

Greenwich, CT – October 10, 2018 – Fieldpoint Private, the fast-growing wealth advisory and private banking boutique serving ultra-high-net-worth families and institutions, today announced that Cari B. Schnipper has joined the firm's New York City office as Managing Director and Senior Advisor.

Ms. Schnipper joins the firm following more than 25 years with Morgan Stanley and its predecessor firm, Citigroup's Smith Barney unit, where she managed approximately $150 million in client assets. At Fieldpoint Private, she will work with successful families on their financial and legacy planning, asset allocation, portfolio management, and banking and lending needs.

Ms. Schnipper, a Certified Financial Planner™, joined Smith Barney as a financial planning analyst in 1989, and became a financial advisor in 1994. She said that many of her clients are executive women with longstanding ties to Citigroup and Morgan Stanley, not just through their work with Ms. Schnipper but as professionals who built their careers at the firms. "It is one thing to invite your clients to follow you to a new firm," she said. "It is quite another when those men and women grew up, professionally, in the firm you left behind." When she told them she had moved, she was bowled over by the positive response. "They said, 'We always knew you belonged in a boutique, and it looks like you found the perfect fit!"

"Cari serves as her clients' advisor on everything that matters in their lives," said Bob Matthews, Fieldpoint Private's president and CEO. "This is what we look for. Her relationships are deeply personal, not just financial. Cari was looking for a firm that could add value to the full scope of care she knows her clients need, and we are pleased that she has found that here."

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.

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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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