EXTEND YOUR VISION

FIRST
MANHATTAN

First Manhattan | Extend Your Vision

Enhancing the potential of your tomorrow requires the right partnership today. When you choose First Manhattan, you are on your way to forming a trusted relationship with an investment advisory and wealth planning firm that is dedicated to helping you secure your financial future.

We believe that our commitments to transparency, personalized client attention and service, deep investing expertise, and excellence in research position us to deliver meaningful value for you.

We work together with you, offering the experience, strategic thinking, and focus you need to achieve specific, long-term goals and to leave a material legacy for generations to come.

TAKE TOMORROW FURTHER.

ON FIRM GROUND

Clients of First Manhattan have benefited from our long-term investment performance, which has helped us earn a reputation for excellence.

Our core strength is investing—rooted in rigorous, consistent research—a skill we have honed over multiple decades, diligently managing clients' assets through six decades of rising and falling markets and shifting economic conditions.

Today, we manage over $31 billion of our clients' wealth, as well as our own personal capital, leveraging the same research-driven investment philosophy. When you partner with us, you can count on our experience building wealth over the long term.

Independently owned and operated by the firm's Partners.

Registered investment advisor and broker-dealer operating subsidiaries

Clearing and custody with Pershing LLC, a wholly owned subsidiary of The Bank of New York Mellon

FOUNDED **1964**

EMPLOYEES **125+**

INVESTMENT PROFESSIONALS **35+**

ASSETS UNDER MANAGEMENT **$31B+**

"I believe our clients are best served by our commitment to remaining an independent, owner-operated investment advisory and wealth planning firm.

For six decades, this independence has enabled us to prioritize the interests of our clients first, fostering a strong alignment between us and helping to create lasting relationships that now span across generations."

Robert W. Gottesman
Executive Chairman

Data as of March 31, 2024.

Registration with the SEC does not imply a level of skill or training.

PEOPLE, NOT PORTFOLIOS

You can expect personalized attention and service. At the core of our service is a direct relationship with a dedicated Portfolio Manager, who can help you understand every aspect of your partnership with us. Our Portfolio Managers and their teams have many years of experience collaborating to serve our clients. They often work with multiple generations of the same family. Clients value their teams' accessibility and knowledge, and the ability to have regular, one-on-one dialogue with the person managing their wealth.

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INFORMED INSIGHTS

Rigorous, independent research forms the foundation of our investment process.

Our dedicated Research team, composed of in-house analysts with industry-focused expertise, evaluate current and prospective portfolio companies to assess the growth potential and soundness of each business. Their due diligence process includes qualitative and quantitative analyses, thorough examinations of financial reports and regulatory filings, and over 100 meetings per year on average with portfolio company management teams and 75–100 meetings per year on average with industry experts.*

This hands-on approach enables us to better understand the factors that determine an investment's success.

*Data as of December 2023.

SEPARATELY MANAGED PORTFOLIOS

You are at the center of the investment process, which we strive to make transparent and straightforward. Your Portfolio Manager constructs your portfolio security-by-security within the framework of your specific requirements. He or she can explain what positions you own, why, and how they contribute to your portfolio.

Our long-term investment approach is grounded in thorough research and analysis and a focus on managing risk. It incorporates equity portfolios and, as appropriate, fixed-income securities.

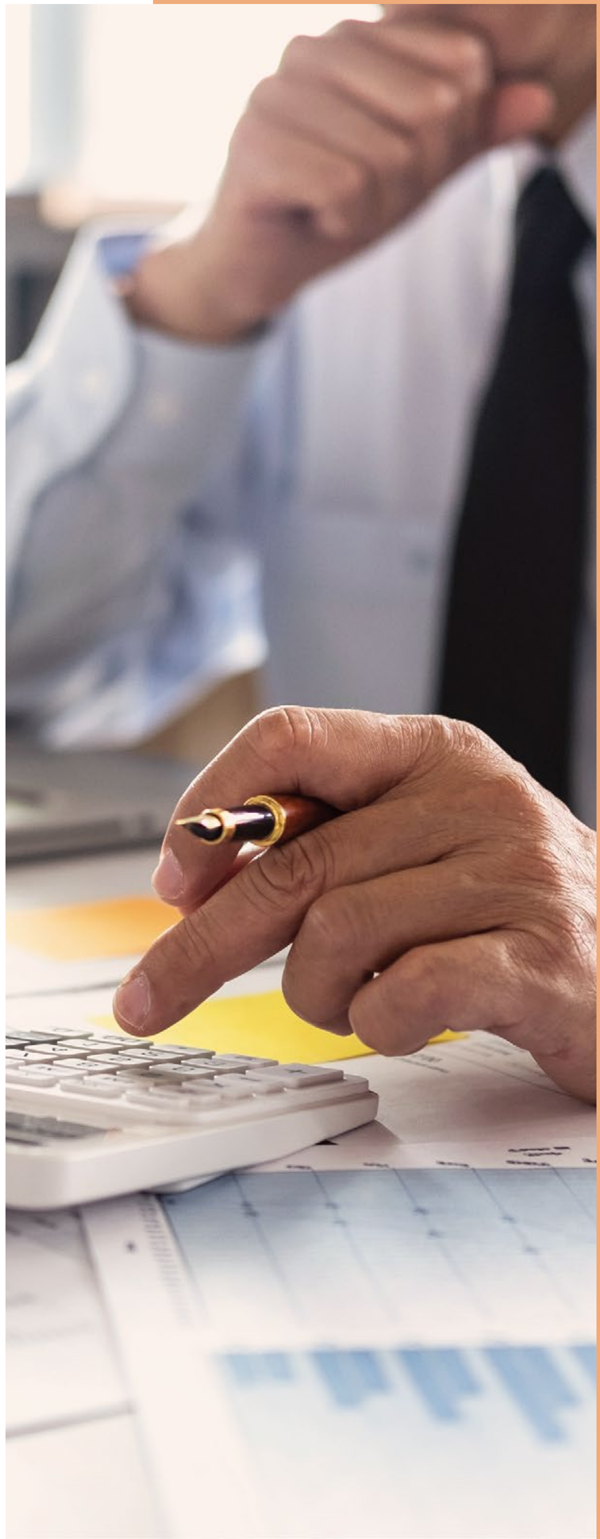
EQUITY

- Invest in companies that we view as shareholder-friendly and that we believe will deliver attractive returns over a long-term investment timeframe
- Balance diversification with a concentration in our most compelling investment ideas
- Designed to grow assets in a manner consistent with individual risk tolerances

FIXED INCOME

- Help generate stable income and preserve capital
- Include both tax-exempt and taxable portfolios
- Focus on high-quality bonds expected to be held until redemption

First Manhattan offers alternative investment strategies to qualified investors.



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WEALTH ADVISORY SERVICES

Your overall financial health is important to us. We can partner with you—as well as your independent advisors, if applicable—to develop a 360-degree view of your financial picture and goals, and assist you with a wide variety of wealth advisory matters.

Let Us Help Guide You

Leverage our expertise and network of specialists for assistance with a range of scenarios, including:

- Financial planning
- Philanthropic solutions
- General tax and accounting strategies
- Estate planning
- Balance sheet management
- Retirement planning

A CLEAR PATH FORWARD

Our team is passionate about your success, and we measure our accomplishments by the value we add for you. We are committed to being your trusted partner to help you realize your long-term vision.

THE RIGHT PARTNERSHIP CAN BEGIN TODAY

To learn more, please visit us at firstmanhattan.com.

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