



GLOBAL PRIVATE WEALTH TALENT PARTNERS

**A Laser Focus on Best-in-Class
Financial Advisor and Other Private
Wealth Talent Placement**



An Introduction to Orbis Talent Partners

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Orbis Global Private Wealth Talent Partners

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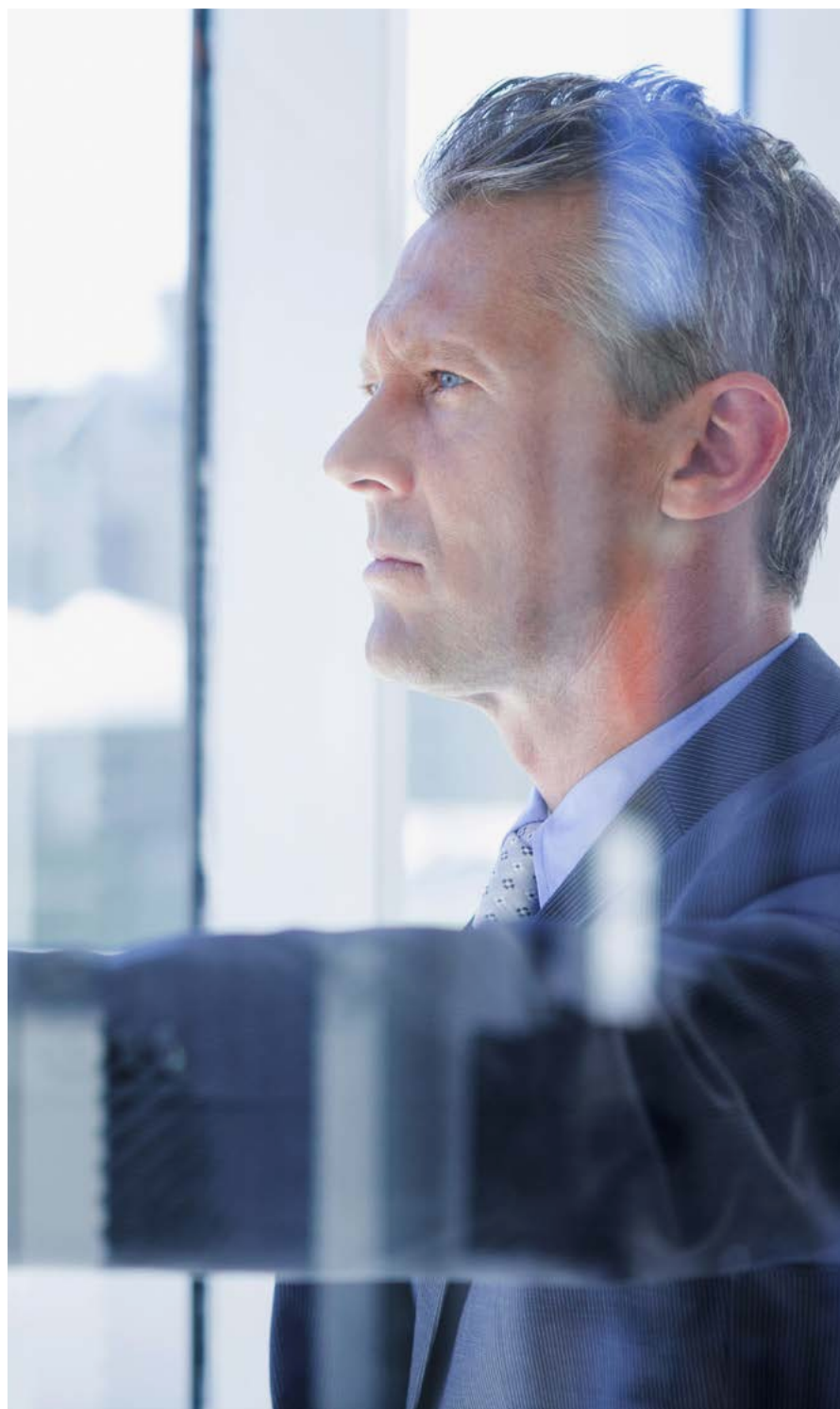


An Introduction to Orbis Talent Partners

ORBIS



Over 20 years
of successfully
sourcing, vetting
and placing
Financial Advisors
and other
Private Wealth
Management
Talent.



Introductory Remarks from our Founder & CEO

Dear Private Wealth Client & Prospective Client,

For the past 20 years now, I have been interested in doing perfect work for and delivering unparalleled results to our asset management clients through the placement of best-in-class client facing and investment talent. Up until now, our clients have primarily been alternative asset management firms.

For the longest time now, I have wanted to take all that we've learned and give that to private wealth clients and talent. And, finally, in January of this year, we very happily launched Orbis Talent Partners' **Global Private Wealth talent practice** (GWTP). Our aim is to become the most respected and most active recruitment firm, globally, in the placement of Financial Advisors and other best-in-class private wealth management industry talent. We got there in our other talent practices, and we will work hard to achieve the same outcome with GWTP over the next few years.

The team we have assembled, brings over 25 years of experience sourcing, vetting and placing FAs (and other PW client-facing/serving assets) across North America for both large marquee private wealth firms and and boutiques alike.

We appreciate your taking the time to review this new piece of marketing collateral, and hope you'll want to engage with us this year!

Most sincerely and respectfully,

Brian Grover

Brian Grover
Orbis Founder & CEO &
GWTP Co-Head



ORBIS TALENT PARTNERS

Orbis Global Private
Wealth Talent Partners

PRIVATE WEALTH

Orbis Global Private Wealth Talent Partners

We only recently officially launched GWTP and are well on our way to our first placements. Though a new Practice for Orbis, the members of GWTP bring over 45 years of asset management recruitment experience to this new Orbis client and talent ecosystem. And collectively, the Co-Heads of this Practice have been executing and closing searches for Private Wealth clients for close to 25 years.

Clients

GWTP team members are now or recently have been engaged in searches for RIAs, IBDs, multi-family offices, private banks, and the private wealth units of asset management firms, banks and brokerage firms. And, of course, these are the types of firms we are in business to serve today and going forward.

Talent

About 1/3rd of Orbis' revenue comes from the placement of fundraisers and salesmen where the target investor (LPs) are HNW

individuals and family offices. So, Private Wealth talent work has been very much in our veins and for a long time. And at least some of this work will get done from GWTP now. But what is new for Orbis and where we expect a significant percentage of our focus to be is on the placement of best-in-class Financial Advisors. Gary Obler brings significant experience (and credibility) working with and placing FAs for our firm. And we can leverage other parts of Orbis to assist with investment and C-level talent which most of our private wealth clients will also need.

Geographical Reach

Orbis' other two practice areas have clients and place talent around the globe, but they built their reputations and track records in North America first, and we imagine the same will be true for GWTP.

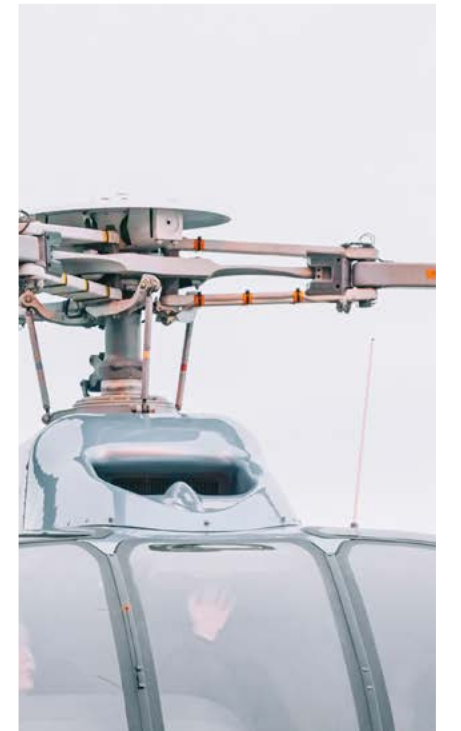
Senior Team

Orbis' Founder & CEO, Brian Grover, is GWTP's Co-Head. His track record

in asset management front-office recruitment is unparalleled. He also heads GFTP which is the leading recruitment firm globally in the placement of fundraising & investor relations talent (and, again, this team's work has a private wealth orientation to it). His GWTP partner, Gary Obler, spent 17 years exclusively recruiting and placing FAs and other private wealth talent prior to joining Orbis. The two of them are also supported by other senior members who, together with Brian and Gary, will ensure perfect work for GWTP clients in 2023 and beyond.

Our Edge

The next page addresses this in a detailed way, but in short, if a PW client isn't looking to be dazzled, then we're not your recruiter. We plan to be the best and our cost structure and business model assures that while we give that to our clients (and talent), that we're also going to cost less than anyone as good as us. Hard to beat.



**Current Orbis
Private Wealth
team members
have transitioned
tens of millions in
revenue.**



Why Orbis for Private Wealth Talent Placement?

A wealth of experience.

We bring **over 45 years of asset management industry recruitment experience** to the new Orbis business of **hunting for and placing Financial Advisors** and other Private Wealth Management Industry talent. And of this 45 years of experience, **over 20 years has been specifically devoted to placing client-facing talent with private wealth clients**. That's a hell of a good starting point for our new business.

We have no off-limits today.

That will change soon enough, but today we have no off-limits.

Delivering unparalleled results.

Orbis is known for doing **perfect work on challenging searches** and recruiters delivering unparalleled results to those searches and those clients. We expect no less from ourselves from this new private wealth practice. In a sea of private wealth, we will stand out for doing perfect work and **on terms, frankly, that are more appealing to our clients than what other premium, high-touch private wealth recruiters can offer**.

Our work sticks.

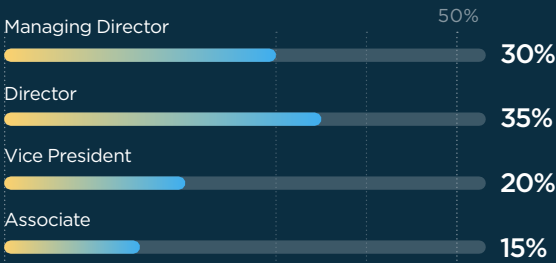
Orbis' founder and his teams have placed over 800 asset management industry client-facing and investment professionals. 95% of those searches were executed with a 12-month free replacement guarantee (for whatsoever reason and at our client's sole discretion), and that guarantee was exercised just 5 times in over 20 years of offering this. **Well less 1% of the time... and that same guarantee accompanies all retained searches executed by this new Global Private Wealth talent practice**.

Placement Statistics

Note: The statistics below represent the combined 25+ years of Private Wealth recruiting successfully executed by GWTP team members. More importantly, this should give you an idea of the type of work you can expect from us.

Talent We Place

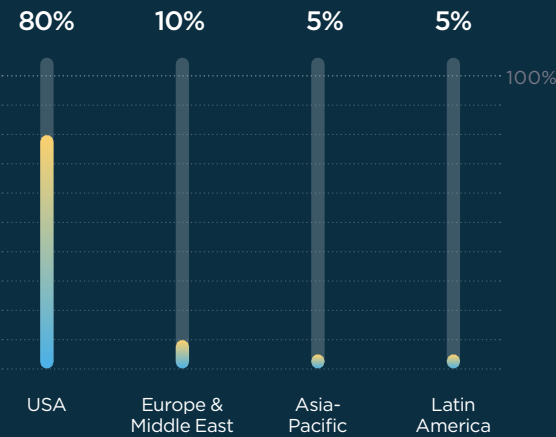
Firm Title



Functional Title



Market

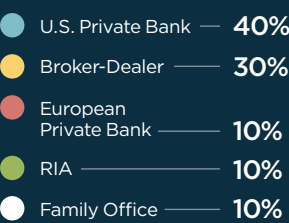


Compensation Type



Clients We Serve

Client Type



Client Location



Other Statistics

Diversity (Women & POC) Placements:
Over 25% (the industry is only about 10%)

Diversity >25%

Total GWTP Placements: 50+

Placements 50+

% of Placements Needed to be Redone (per 1 year guarantee): <1%

Placements Redone <1%

Average time from start to finish of a GWTP Search: 12 weeks (half the industry average)

Search Duration 12 wks

Average amount of time it takes for a client to meet the finalist: Less than 8 weeks

Finalists <8 wks

Past Placements & Ongoing Searches

Financial Advisors & Private Bankers

This is a representative sample of Financial Advisor and Private Banker placements.

<div>Managing Director</div> <div>PRIVATE BANKER U.S. PRIVATE BANK</div> <div>NEW JERSEY</div>	<div>Managing Director/ Director Team</div> <div>FINANCIAL ADVISORS U.S. WEALTH MANAGER</div> <div>NEW YORK</div>	<div>Managing Director</div> <div>PRIVATE BANKER U.S. PRIVATE BANK</div> <div>HOUSTON</div>
<div>Managing Director</div> <div>RELATIONSHIP MANAGER EUROPEAN BANK</div> <div>BOSTON</div>	<div>Director</div> <div>FINANCIAL ADVISOR U.S. WEALTH MANAGER/LATAM</div> <div>MIAMI</div>	<div>Director</div> <div>PRIVATE WEALTH MANAGER MULTI-FAMILY OFFICE</div> <div>NEW YORK</div>
<div>Director</div> <div>PRIVATE BANKER U.S. PRIVATE BANK</div> <div>PALM BEACH</div>	<div>Director</div> <div>PRIVATE BANKER U.S. PRIVATE BANK</div> <div>SAN FRANCISCO</div>	<div>Vice President</div> <div>PRIVATE BANKER U.S. PRIVATE BANK</div> <div>LOS ANGELES</div>

Other Private Wealth Executives

This is a representative sample of other talent types placed with our Private Wealth clients.

<div>Managing Director</div> <div>HEAD OF INVESTMENTS U.S. PRIVATE BANK</div> <div>NEW YORK</div>	<div>Managing Director</div> <div>GLOBAL MARKET MANAGER U.S. PRIVATE BANK</div> <div>NEW YORK</div>	<div>Director</div> <div>INVESTMENT COUNSELOR U.S. PRIVATE BANK</div> <div>NEW YORK</div>
<div>Director</div> <div>FAMILY OFFICE & UHNWI COVERAGE, MULTI-FAMILY OFFICE</div> <div>DENVER</div>	<div>Managing Director</div> <div>RIA & FAMILY OFFICE COVERAGE, MULTI-FAMILY OFFICE</div> <div>NEW YORK</div>	<div>Director</div> <div>SENIOR HNWI FUNDRAISER, REAL ESTATE PE GP</div> <div>CHARLOTTE</div>
<div>Director</div> <div>SENIOR HNWI & FAMILY OFFICE FUNDRAISER, HEDGE FUND PLATFORM</div> <div>ATLANTA</div>	<div>Marketing Communications Executive</div> <div>MULTI-FAMILY OFFICE</div> <div>HOUSTON</div>	<div>Vice President</div> <div>PORTFOLIO MANAGER US PRIVATE BANK</div> <div>PALM BEACH, FL</div>

Our Core Values & Culture

Integrity

Absolute integrity and total honesty are at the core of everything we are and everything we do as Orbis and as human beings in this thing we're doing together within our respective ecosystems and for our clients. Integrity comes well ahead of business success for us.

Reputation

Related to the above, our reputation is everything to us. We protect it jealously as do the brand and reputation of our clients. We will pass on any talent or prospective client or co-worker or vendor that threatens this.

Good People

Related to the above, we are good people. We only want to work with good people. We know what it's like to work with the not good people and we know what it's like to have that within our own company. No thank you. It's not worth it. Life is short.

Constant Improvement

Our goal is to always improve. Little by little, over 18 years, I have (and now we are) refined what I do and what we do in this business. Massive improvements over that span of time; a few yards at a time. So many lessons learned. So many tiny improvements and a few big ones too along the way. We are relentless about this. We will never stop improving on behalf of our clients and our ecosystems.

Perfection

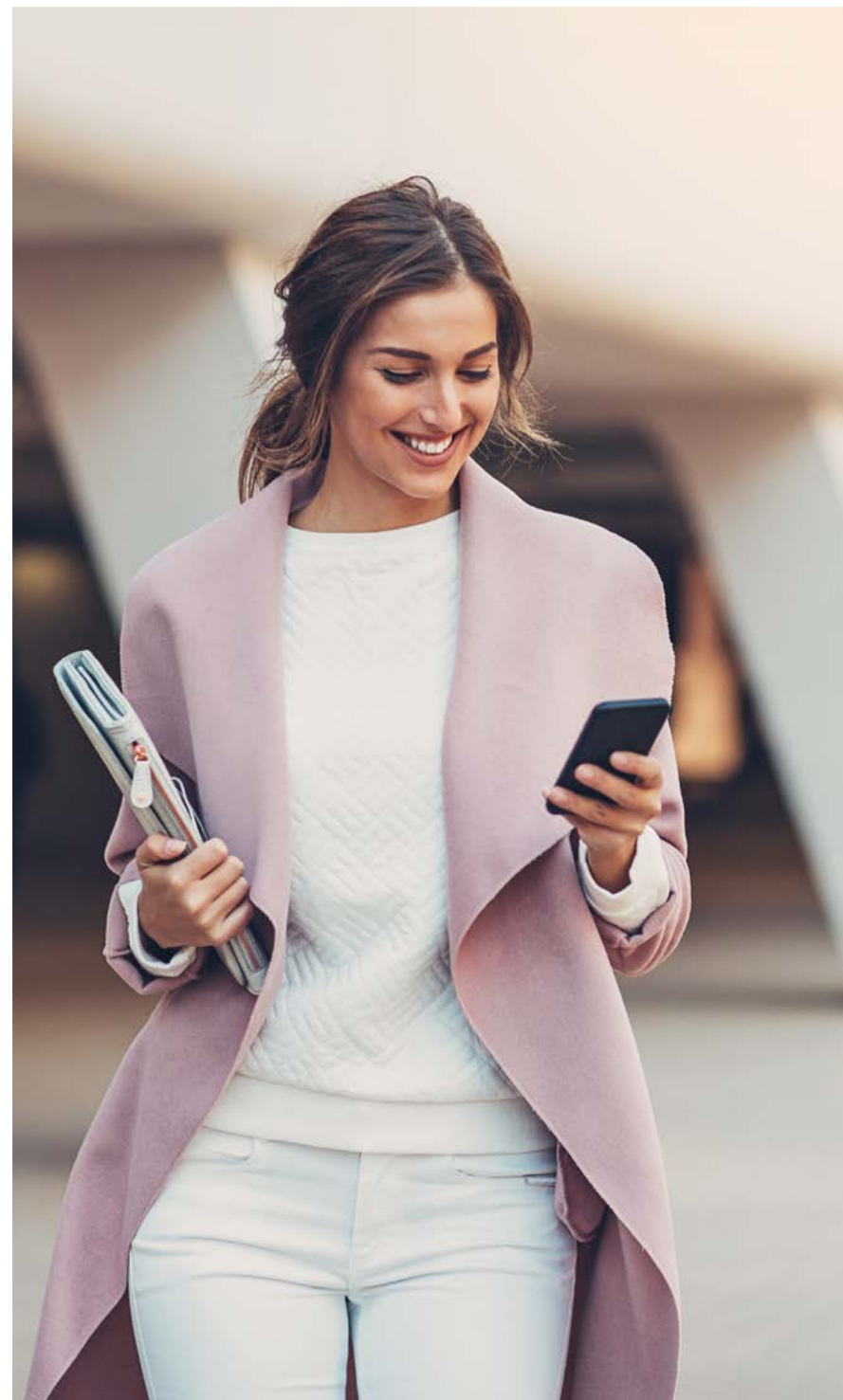
Related to the above goal to constantly improve, we go into every search with the goal and expectation of doing perfect work for our clients. Indeed, if our client doesn't need us to deliver a perfect result, we're not interested. We'll pass, thank you. Plenty of mediocre recruiters out there for that. We want perfect execution. Perfect results.

Respect

We have the utmost respect for each other as partners and teammates and friends here at Orbis. And we expect this from and give this in spades to our clients, talent ecosystems and vendors.

Material Value Creation

We don't have the slightest interest in a placement per se. Don't need that. Don't strive for that. We do strive to help our clients thrive, grow, build - for the long term. And we're sure we're delivering this the vast majority of the time.



Our Team

This is the senior team of Orbis Private Wealth Talent Partners. We have a team double this size, if and when we need their collaborative efforts.



Brian Grover

Orbis Founder & CEO, Co-Head (GWTP)

Brian Grover, GWTP's Co-Head, formed his first global asset management industry recruitment boutique in 2004 after spending about 15 years on Wall Street as part of and eventually leading structured products businesses for J.P. Morgan, Credit Suisse, DLJ and Lehman Brothers. When he understood how to deliver perfect results to his clients and how to give this to them at a dramatically lower price point, he formed Orbis Talent Partners in 2017. Orbis' first talent practice area (placing fundraising & IR professionals) is now widely considered to be the best in the world in this talent vertical. Its third and final practice area is Global Private Wealth talent practice (GWTP), and we intend to become among the very best in the world in this vertical too!

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Gary Obler

Partner, Co-Head (GWTP)

Gary Obler joined Orbis Talent Partners in 2022 as Partner and Co-Head of the Global Private Wealth talent practice (GWTP). His mandate is to build a firm vertical focused on placing best-in-class financial advisors and other private wealth professionals with preeminent financial institutions. Previously, Gary was a Managing Director and Chief Operating Officer with D.S. Wolf Group International, LLC, a boutique financial services focused executive search firm. He served as a generalist within the financial services arena with a concentration in Private Wealth. Gary graduated Cum Laude from Boston University with a BA in Psychology.

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Katie Grover

Director (GWTP)

Katie Grover joined Orbis Talent Partners in 2022 as Director of the Global Private Wealth talent practice (GWTP). Katie focuses on placing best-in-class financial advisors and other private wealth professionals in financial institutions across the globe. Prior to joining Orbis Talent Partners, Katie worked as an integration engineer at PayPal and Head of Research at a boutique executive recruitment firm. Katie graduated from the University of Delaware with a double major in International Business and Mandarin Chinese.

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Stephanie Cummings

Partner, Managing Director, Head (GITP)

Stephanie Cummings joined Orbis Talent Partners in 2020 and is Partner and Co-Head of the Investment talent practice. Stephanie leads business development, the management of existing client relationships, and all aspects of search execution for alternative asset managers globally. Before joining Orbis, Stephanie specialized in real estate investment talent searches for an executive search firm in NYC, facilitated CRE transactions through her own brokerage firm, and supported the real asset management team with a family office. Stephanie graduated from the State University of New York at Fredonia with a BA in Sociology.

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Amaris Rodriguez

Business Management

Amaris Rodriguez joined Orbis Talent Partners in 2022 as our Business Manager. She focuses on overseeing and maintaining the daily business operations across the different departments of our firm. Amaris graduated Magna Cum Laude from the University of Puerto Rico with a major in Psychology and a minor in Business Administration. She is currently finishing her Juris Doctor at the University of Puerto Rico Law School.

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Our Global Private Wealth Talent Practice Team

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