

ABOUT GLOBALBRIDGE

GlobalBridge is an investment management firm that provides open architecture managed accounts solutions to financial institutions that target the high net worth and middle-market institutional segments. GlobalBridge was founded in 2000 and is based in Minneapolis, Minnesota, with sales offices located Austin, Texas, and Chicago, Illinois.

With interfaces to all major trust accounting providers and custodians GlobalBridge redefined the industry standard for active open architecture. GlobalBridge works with over 70 financial institutions located throughout the U.S.

KEY FEATURES:

- GlobalBridge performs manager due diligence and implements the managers' models while adjusting for individual client guidelines and restrictions. Utilizing its proprietary interfaces, GlobalBridge trades, settles and reconciles all transactions and positions in the underlying accounts.
- Financial Advisors develop and maintain client relationships, recommend asset allocations and provide objective investment advice. The advisors retain custody of client assets while we provide statementing and performance reporting.
- Investment managers focus on portfolio construction and modeling based on their proprietary securities and sector research. The managers provide GlobalBridge with proprietary and confidential access to their portfolio models.

ACTIV OPEN ARCHITECTURE FOR MANAGED ACCOUNTS

Setting the standard for investment management using an overlay process.

- **A**ccess to world-class multi-manager, multi-asset class portfolio
- **C**ustody neutral
- **T**rading with institutional brokers; lower cost & best execution
- **I**nterface with custodians and accounting systems
- **V**ehicles include individual securities, mutual funds, alternatives and ETFs; flexibility of investment options

GLOBALBRIDGE FUNDAMENTALS

LEADING PROVIDER OF OPEN ARCHITECTURE SOLUTIONS

Providing services to 70+ financial institutions

PROPOSAL GENERATION

Online and customized proposals

ROBUST INVESTMENT SOLUTIONS

50+ managers and 100+ portfolio strategies

INVESTMENT SUPPORT

Published quarterly manager performance reviews

Monthly calls featuring an investment manager presenting/reviewing their strategy

Monthly calls with GlobalBridge investment team

Investment products are not FDIC insured.

CONTACT INFORMATION

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