



**FOR IMMEDIATE RELEASE**

**Lowenhaupt Global Advisors And Rogerscasey Offer Services To Strengthen Investment and Risk Management For Families Of Significant Wealth**

***New Agreement Provides Institutional Caliber Investment Services for Private Wealth Holders and Family Offices***

**ST. LOUIS, MO. and DARIEN, CT., Sept. 22, 2010** – Lowenhaupt Global Advisors and Rogerscasey today announced an agreement to provide services to help ultra high net worth families strengthen their investment management and improve the efficiency and effectiveness of their family office.

Rogerscasey is one of the world's leading institutional investment solutions firms, with \$315 billion in assets under advisement. Lowenhaupt Global Advisors is one of the oldest and most trusted providers of single-family office services to global families of significant wealth. Together, they will offer families and single-family offices enhanced investment due diligence capabilities, a broader selection of investment managers and access to Rogerscasey's in-depth investment research.

The service will be offered to a select number of families in the United States and abroad.

"The financial turmoil of the past few years has led many families of significant wealth to realize that they need the highest quality due diligence and risk management," said Charles Lowenhaupt, CEO of Lowenhaupt Global Advisors. "This unique relationship provides the best of both worlds: Rogerscasey's institutional caliber investment expertise and Lowenhaupt Global Advisors' experience helping very wealthy individuals and families utilize due diligence and manage investment risk."

Today's announcement follows an agreement between the two companies in January, when Lowenhaupt Global Advisors and Rogerscasey began working together. Since then, Rogerscasey has been providing family office clients of Lowenhaupt Global Advisors an enhanced level of customized portfolio management.

"The relationship between Rogerscasey and Lowenhaupt Global Advisors has worked very well, and we recognize it will be of real value to families of significant wealth around the world," said Tim Barron, President and CEO of Rogerscasey. "Both Rogerscasey and Lowenhaupt Global Advisors believe that institutional strength investment analysis and evaluation capabilities can ensure the safety, continuity and appropriateness of an investment strategy for families and family offices. We are bringing to market services that neither firm could deliver on its own."

### **How It Works**

For families, Rogerscasey will offer strategic analysis, due diligence and asset allocation advisory services currently provided to its institutional investor clients. Rogerscasey will also provide families with its Strategy Specific Platforms, which are investment funds that provide access to illiquid, semi-liquid or capacity-constrained investment strategies. Rogerscasey will also offer multi-manager programs, which provide access to manager-of-manager investment solutions.

Lowenhaupt Global Advisors will work with families on a day-to-day basis to ensure that a customized investment plan is in place for each family member and that family members realize the full benefit of Rogerscasey's expertise. Lowenhaupt Global Advisors will ensure that portfolios and investment policies meet the needs of trusts and foundations and allow trustees and managers to fulfill their fiduciary obligations. Lowenhaupt Global Advisors will also help families manage the tax consequences of any investment and work with Rogerscasey and a client's tax advisors.

To learn more, please contact Joe Rechter, Lowenhaupt Global Advisors, 314.345.8181, [joe.rechter@lowenglo.com](mailto:joe.rechter@lowenglo.com).

### **About Lowenhaupt Global Advisors**

Lowenhaupt Global Advisors has been helping families of substantial wealth build, preserve and control their assets for 100 years. Working with the affiliated law firm of Lowenhaupt & Chasoff, Lowenhaupt Global Advisors provides sophisticated, independent advice on family wealth transfer, taxation, estate planning and probate, investment portfolio allocation and business structuring. For more information about Lowenhaupt Global Advisors, call 314.345.8181 or visit [lowenhauptglobaladvisors.com](http://lowenhauptglobaladvisors.com) and for Lowenhaupt Global Advisors Australia, call +61 2 8297 6566 or visit [lowenglo.com.au](http://lowenglo.com.au).

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### **About Rogerscasey**

Rogerscasey is a global investment solutions firm servicing institutional and high-net-worth investors for over 40 years. With clients worldwide, the firm provides a full array of services ranging from investment advisory to implemented solutions, all supported by a deep commitment to a strategic manager research process. The Rogerscasey team of leading industry experts helps clients stay ahead of economic trends, delivering insight toward achieving maximum results. Learn more at [www.rogerscasey.com](http://www.rogerscasey.com).

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