



ThresholdGroup

Helping successful families achieve what matters most

OVERVIEW

Threshold Group, a multi-client family office, manages the financial and wealth management needs of a select number of wealthy families and private foundations throughout the United States.

Threshold's approach differs from the norm in the wealth management arena. We don't sell products or off-the-shelf solutions. Threshold listens to each client's needs in order to provide a customized set of services. This allows us to serve each client as a unique entity while offering a wide range of expertise and a collaborative network of common ideas and interests.

ORIGINS

Our approach originated with a specific family, for a specific family. Threshold Group was founded by Jane and George F. Russell, Jr., who together built Frank Russell Company into a successful global investment services firm. George led in pioneering the field of multi-manager investment advisory services, and Jane was recognized as "the soul" of the firm. The Russell family created Threshold Group when their company (now Russell Investments) was acquired by Northwestern Mutual in 1999. In early 2010, an asset acquisition involving Ashbridge Investment Management allowed Threshold to better serve clients by adding full-service capabilities in Philadelphia.



OUR VALUES

Our values represent a common belief set among our people and our clients. Our values focus on non-negotiable integrity, continuous learning, teamwork, service and dignity of the individual. Our values are applied not as some sort of ideological high ground, but as daily guideposts as we strive to create impeccable service relationships. They are not contrived. Our values-driven culture began with the Russell family and has led to Threshold being repeatedly named to the top spots on the Best Places to Work list, as compiled by *Washington CEO* magazine.

OUR DISTINGUISHING QUALITIES

- *Wealth management as an open-architecture process, not a product*
- *100% family ownership and independent governance*
- *Vision and focus to achieve each client's unique purpose*
- *Valuable access to Russell Investments' global manager research and analysis*
- *Peer-to-peer communities of interest among family clients*

OUR SERVICE RELATIONSHIPS

Threshold takes pride in working collaboratively with each client's advisors across a full range of services. Our organization is about people *and* portfolios – and the balance of services that must exist between them. Our approach recognizes the importance of each client's circumstances while applying a discipline and professionalism that can result in measured achievement. Threshold works with a select number of multi-generational families and private foundations whose aspirations are dynamic and complex. Wealth services encompass investment strategy, financial planning, legacy planning and a wide range of family office administrative work.

OUR OFFICES

Gig Harbor, Washington
PO Box 2358
Gig Harbor, WA 98335
T: 253.851.4300

Seattle, Washington
2607 Second Avenue
Suite 300
Seattle, WA 98121
T: 206.436.5081

Portland, Oregon
121 SW Salmon Street
11th Floor
Portland, OR 97204
T: 503.471.1376

Philadelphia, Pennsylvania
Two Liberty Place
50 S. 16th Street, Suite 3525
Philadelphia, PA 19102
T: 267.443.2220