

Family Office Solution Suite

Family Offices

BLOOMBERG PROFESSIONAL SERVICES

Bloomberg
Buy-Side Solutions

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Your legacy. Our business.



Bloomberg understands the inherent complexities that come with managing extraordinary wealth. We provide cutting-edge technology that helps you make the decisions that will matter for decades to come. The Bloomberg Terminal® enables single- and multi-family offices to generate, monitor and protect their wealth.

Our broad array of specialized solutions empowers you to successfully implement optimal portfolio and targeted-risk strategies using the same news, data and analytics relied on by the world's most demanding financial professionals, every day.

We deliver all the tools and insight you need to stay ahead of regulatory change, locate liquidity, identify new investment alternatives and trading opportunities, and defend the successes of the past to provide for a richer future.

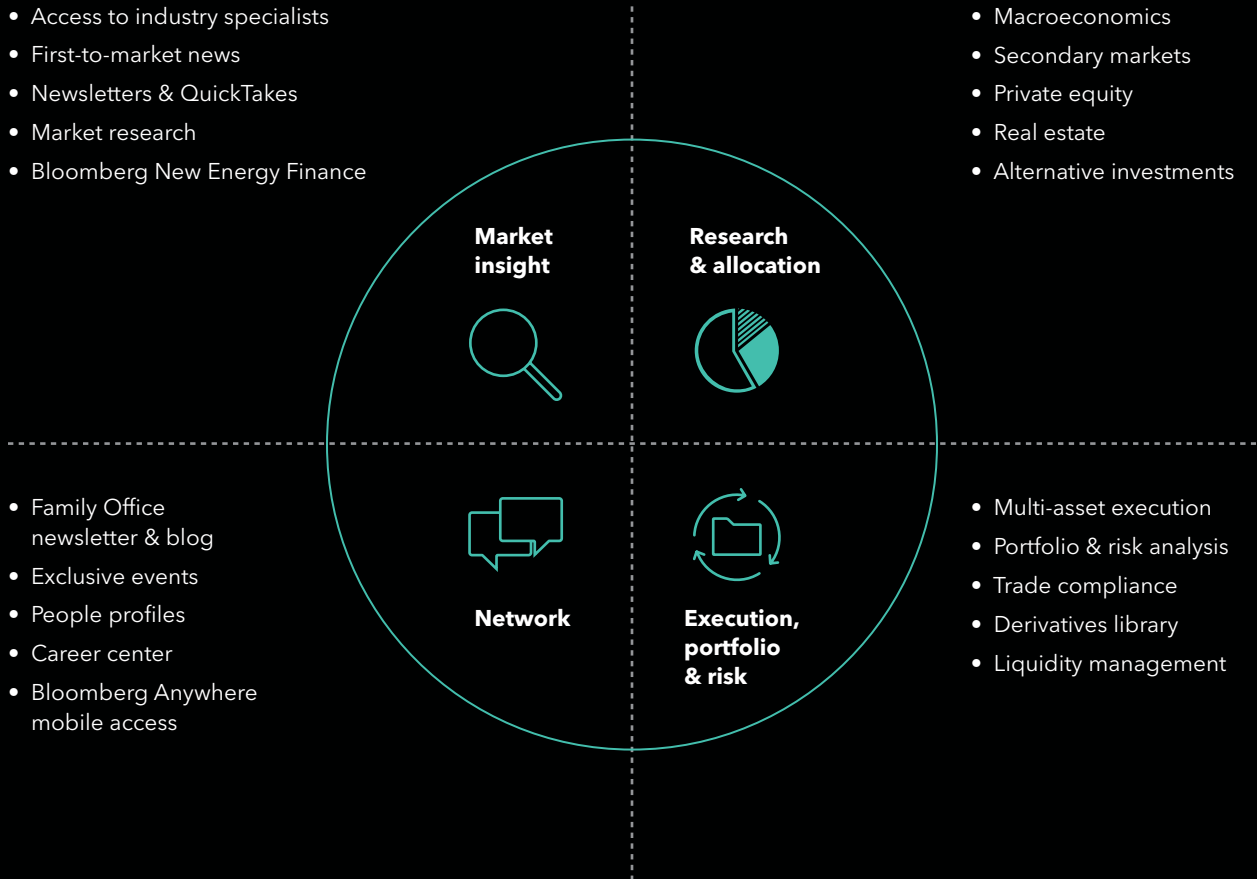


Partner with an industry leader

Bloomberg offers a broad array of solutions to help single- and multi-family offices generate and protect their wealth with powerful research tools, optimal portfolio and targeted-risk strategies, networking capabilities, in-depth market intelligence.

- Access to industry specialists
- First-to-market news
- Newsletters & QuickTakes
- Market research
- Bloomberg New Energy Finance

- Macroeconomics
- Secondary markets
- Private equity
- Real estate
- Alternative investments



- Family Office newsletter & blog
- Exclusive events
- People profiles
- Career center
- Bloomberg Anywhere mobile access

- Multi-asset execution
- Portfolio & risk analysis
- Trade compliance
- Derivatives library
- Liquidity management

Network

The Bloomberg Terminal gives you access to a community of over 325,000 of the world's most influential decision makers in finance, business and government. Connect with other family offices and high-net-worth individuals from across the globe, and gain access to exclusive Bloomberg events, newsletters, blog content and career opportunities tailored to family offices.

Feature	What Bloomberg offers
Newsletter & blog	Stay connected with the latest news, research and analysis on timely topics pertinent to family office executives.
Exclusive events	Receive invitations to Bloomberg events and share experiences and insights with other family offices and high-net-worth clients.
People profiles	Gain access to Bloomberg's vast database of biographical and contact information, so you can conduct research on prominent global figures and enhance your contact network. Access a vast database of biographical and contact information – including top-ranking executives and board members for a selected security – so you can conduct research and enhance your contact network.
Career center	Employ Bloomberg Talent Search to post jobs and find certified candidates to meet your hiring needs.
Instant message	Have real-time text-based conversations with your colleagues and clients so you can quickly share and act on important information.

Market insight

Broaden your view of global financial markets with breaking news headlines combined with in-depth insight and analysis. The Bloomberg Terminal gives you access to market-moving reporting from Bloomberg News alongside independent research from Bloomberg Intelligence's expert analysts and valuable context from our worldwide team of market specialists.

Feature	What Bloomberg offers
Access to industry specialists	Get exclusive access to market and industry specialists with an average of more than 15 years experience. Bloomberg's specialists use their deep understanding of the market to put the data, analytics, and insight you need at your fingertips, helping to facilitate creative investment ideas and simplify strategic and financing decisions.
First-to-market news	Bloomberg News delivers exclusive and actionable coverage by more than 2,700 experienced journalists in 120 countries, on one integrated platform. Up-to-the-second, in-depth, and across asset classes, our award-winning coverage provides family offices with the information they need to react quickly to shifting markets and make considered, long-term investment decisions.
Market research	Retrieve single security, sector, and aggregated market reports from over 2,500 providers globally, including market-neutral research from Bloomberg Intelligence, in real-time and on the move.
Newsletters & QuickTakes	Subscribe to any of our Bloomberg Brief digital newsletters and QuickTakes covering 29 topics across financial markets, cryptocurrencies, economics, industries and current affairs, to help you stay informed of critical themes in the market. Bloomberg Brief also provides family office special reports.
Bloomberg New Energy Finance	Bloomberg New Energy Finance (BNEF) is the world's foremost provider of industry-leading research and analysis, up-to-the-minute verified news, and data on clean energy, low-carbon technologies and the carbon markets.
Alternative Insights	Bloomberg's Supply Chain Function, SPLC <GO>, maps a company to its customers, suppliers and competitors. TREN <GO> is a news-ranking function that allows you to see which companies are generating the highest readership, the strongest sentiment, or the most news or social post volume over a selected time frame.

Research & allocation

The Bloomberg Terminal provides in-depth coverage across every asset class, from fixed income to equities, foreign exchange, derivatives, commodities and real estate – along with a growing fund database to help you make investment decisions with confidence.

Feature	What Bloomberg offers
Macroeconomics	The Bloomberg Terminal offers comprehensive economic coverage that makes it easy to see what is affecting the markets and impacting your trading and investment day. With the latest releases, historical data and forecasts from key national agencies, institutions and private sources, our economic suite offers unparalleled support for your investing, trading and business decisions.
Secondary market	Utilize Bloomberg's equity and fixed income screening tools to look for companies and securities that meet your customized set of criteria, then backtest the results to validate your trade ideas.
Private equity	<p>Manager/deal search: Track and analyze private deals in real time, so you can stay informed about all transaction-related activity occurring across numerous regions and sectors, and easily filter for deals by a range of dimensions, such as deal type, size and advisor.</p> <p>Private company database: Screen for private companies by industry, sector, country of domicile, company name etc. so that you can refine research on a particular company and learn more about its management, M&A activity, peers, and corporate actions.</p>
Real estate	Access the real-estate dashboard for in-depth industry outlooks, latest news, and key industry indicators, to help you make more confident property investment decisions.
Alternative investment	<p>Fund database Follow the funds industry using a wide range of tools for searching, peer grouping, and single fund analysis through our extensive and continually expanding database of more than 130,000 funds, hedge funds, and exchange-traded funds.</p> <p>Private placement memorandum manager Use our document management system to leverage data found in Private Placement Memorandums and make more informed investment decisions in less time. You can organize PPMs, compare management fees across similar funds, calculate custom benchmarks, see deal-by-deal performance metrics, and much more.</p> <p>Mandates portal Bloomberg's closed ecosystem of financial professionals permits investors to target committed portfolio managers, conveying investment criteria to only the most qualified alternate investment managers.</p> <p>Cryptocurrency Use Cryptocurrency Monitor to track intraday pricing for cryptocurrencies, indices, and futures contracts in real time.</p>

Fixed Income	Global coverage of private and public market alternative credits, including liquid products such as CLOs, mortgages and syndicated loans.
Hedge funds	Gain an edge with Bloomberg's Hedge Fund Database – an essential resource for investors seeking new investment opportunities and control over data.

Execution, portfolio & risk management

With superior execution, portfolio and risk management, compliance, and valuation tools, Bloomberg empowers you to successfully implement optimal portfolio and targeted-risk strategies.

Feature	What Bloomberg offers
Multi-asset execution	Harness the power of our multi-asset, commission-free electronic trading platform for the execution of equity, fixed income, FX, and commodity products. With the widest global broker network, our execution platforms are integrated with Bloomberg exchange and broker data, and provide straight-through processing (STP) across multiple asset classes.
Portfolio performance & risk analysis	Leverage our multi-asset portfolio and risk system to analyze the structure, historical performance and potential sources of risk for an existing portfolio, or during the manager due diligence process. Construct and monitor the performance of portfolios, including external managers, separately managed accounts, and alternative assets. AIM can also be integrated with third-party visualization tools, such as Tableau and PowerBI, to conduct portfolio performance and risk analysis.
Trade compliance & order management	Bloomberg Asset and Investment Manager (AIM) delivers global, multi-asset solutions for front-end portfolio, trading, and middle- and back-office operations. PORT can help capture real-time market movements in portfolios and provides a centralized platform to manage communications with private banks and other counterparties.
Derivatives Library	Tap into a powerful, independent platform for creating, pricing, analyzing, and sharing derivatives and structured products with the Bloomberg Derivatives Library (DLIB).
Liquidity management	Liquidity Assessment, part of Bloomberg's Regulatory and Accounting offering, helps you measure the liquidity risk of portfolio holdings by measuring the bond's liquidation cost, time to liquidation and the probability of selling.

Lifestyle

Wine and dine your clients and contacts in style. Subscribe to Bloomberg Pursuits magazine and our restaurant guide to enhance your working lunches and after-hours entertainment.

Feature	What Bloomberg offers
Bloomberg Pursuits	Bloomberg's hub for lifestyle news and luxury reviews. Your guide to the best food, fashion, travel, cars, watches, real estate, gadgets, wine, cocktails, art and antiques.
Restaurant guide	Use DINE <GO> on the Bloomberg Terminal to find the best restaurants and read the latest reviews and recommendations by the Bloomberg community on over 8,000 eating establishments. Submit your own reviews, make reservations in real-time, and save a list of your personal favorite restaurants for easy access.
Airline Flight Schedules	Access worldwide flight information, so you can research flight options and make informed travel decisions.
Bloomberg Billionaires Index	Read a ranking of world's highest net-worth individuals and monitor how their fortunes change on a daily basis as markets fluctuate.

Committed to understanding your unique needs

From macroeconomic and industry analysis, investment manager selection and due diligence. From risk mitigation and management to performance attribution and reporting, Bloomberg is committed to helping family offices secure their legacies. As experts in managing business-critical information, we understand the level of privacy and security family offices require.

To find out more about how we can help you with your family office, contact your regional sales representative or visit us at [bloomberg.com/professional/family-offices](https://www.bloomberg.com/professional/family-offices).

Sustainable Finance

Bloomberg provides data, scores, analytics, indices, research and news to help investors and companies better evaluate assets and report on sustainability disclosure and performance in a rapidly evolving economy. Our robust ecosystem of sustainable finance solutions can enhance all approaches to ESG investing and portfolio optimization, as well as corporate strategy and risk management.

We also release an annual impact report on how we're helping our clients, employees and communities create a more sustainable future.

A large grid of empty white boxes on a black background, arranged in a stepped pattern from the bottom-left towards the top-right. The grid consists of multiple rows and columns of rectangular cells. The top-left corner of the grid is at approximately (535, 348) and the bottom-right corner is at approximately (185, 908). The grid is composed of several distinct rectangular sections of varying sizes, all rendered in white against the black background.

About Bloomberg Professional Services.

Bloomberg Professional Services – the Bloomberg Terminal and our enterprise data management and integration services – provide real-time data, breaking news, in-depth research, powerful analytics and world-class execution capabilities to help financial professionals make smarter, faster and more informed decisions.

Take the next step.

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