



BALLENTINE PARTNERS

Ballentine Bulletin

Welcome to the latest issue of the Ballentine Bulletin, providing you updates, news and information from Ballentine Partners. This issue highlights includes a recent blog from Coventry Edwards-Pitt on the gifts we give our children as well as an excerpt from Charlotte Beyer's book "Wealth Management Unwrapped."

A True Gift for the Holidays

Family Office Exchange featured Coventry Edwards-Pitt's blog post about gifts we give our children. Here is a quick glimpse:

"With toy catalogues in the mailbox and Thanksgiving right around the corner, I've been finding myself thinking a lot lately about the gifts we give to our children and which ones they end up being truly thankful for when they are older. I recently had the opportunity to hear a lot about this topic in discussions I had with real-life grounded and successful inheritors (for my book *Raised Healthy, Wealthy & Wise*.) What I learned from the inheritors I spoke with is that the gifts they appreciated the most in hindsight were not ones that they were thankful for (or even happy with!) at the time."

Read the entire blog post [here](#).

An excerpt from *Wealth Management Unwrapped* by Charlotte B. Beyer

Charlotte B. Beyer, the founder of the Institute for Private Investors (IPI), has released a new book aimed at helping families select and partner with the right advisor. Jay Hughes, author of a number of his own formative works in the industry including *Family Wealth*, said the following about the book: "Charlotte Beyer's long, professional journey to deconstruct and reconstruct the process of how a private investor goes about choosing an advisor is deeply discerning and enlightening. *Wealth Management Unwrapped* offers investors a process for taking responsibility for their investment process as its patron and not as its patsy. Investors will benefit immensely if they exercise the disciplined steps of the 10 principles Beyer outlines." We are grateful Charlotte has shared an excerpt with our readers.

Read the excerpt [here](#) and learn more about the book [here](#).

THIRD QUARTER, 2014

Announcing our new website

We recently launched [our new website](#).

Let us know what you think!

3rd Quarter year Market Review

Our Investment Management Group discusses the breadth of market results thus far in 2014 and our expectations for the rest of the year.

Click [here](#) to read the analysis.

Ballentine in the media

- The Wall Street Journal features Covie Edwards-Pitt in "Elite Adviser: Be a Consultant to Wealthy Families"
- Roy Ballentine speaks with Private Asset Management on the importance of insurance

See the articles [here](#).

Raised Healthy, Wealthy & Wise, Holiday Toolkit

We have partnered with 21/64 to compile packets to facilitate family conversations about values and money messages around the holidays. Read more about the toolkit [here](#).

If you missed it...

THINK Forum: Aging Wisely & Well: Surprising truths and best practices in later life living

On October 21, we were joined by Miles Varn, Chief Medical Officer at Pinnacle Care, and George Vaillant, M.D. and Director of the Harvard Study of Adult Development. View the video [here](#).

**Save the date for our next THINK Forum on Thursday January 29, 2015 on

"The Future of Education." ***