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For more than three decades, Bloomberg has helped demanding financial professionals make smarter, more informed decisions. Today, the same high-quality data and insight used by traders, analysts and portfolio managers worldwide informs the specialized tools we have developed for family offices and other high-net-worth investors.
PARTNER WITH AN INDUSTRY LEADER

BEYOND DATA, MORE THAN NEWS
When you think of Bloomberg what comes to mind? High-quality, real-time data? Timely, global business and financial news? Or perhaps the world’s largest, most technologically advanced private network? Indeed, we are all of those things. What you might not know, however, is that the Bloomberg Professional® service offers a broad array of tools that help single- and multi-family offices generate, monitor and protect their wealth. Bloomberg empowers you with the tools you need to successfully implement optimal portfolio and targeted-risk strategies.

UNDERSTANDING SPECIALIZED NEEDS
By listening to what our family office clients value most, we are able to understand their goals for current and future generations. From macroeconomic and industry analysis, investment manager selection and due diligence to risk mitigation and management, performance attribution and reporting, Bloomberg is committed to addressing the inherent complexities of significant wealth and helping our family office clients secure their legacies. As experts in managing business-critical information, we understand the level of privacy and security family offices need.

“Wealth rarely happens by accident. Leveraging a solution that balances risk with impact ensures it isn’t lost that way.”
– Michael Bloomberg
INSIGHT

First to market news that really impacts the financial world is a cornerstone of Bloomberg News, but for the family office it is Bloomberg’s ability to see a story through that truly adds value. With 150 bureaus in 73 countries, the scope of Bloomberg news is unmatched. Covering topics as diverse as population growth in sub-Saharan Africa, the latest technology IPO in Silicon Valley or drought-affected commodity prices, we provide the coverage relevant for long-term investment decisions.

INTELLIGENCE

Bloomberg Intelligence offers a unique approach to research—combining the insight of a team of experienced analysts with deep and comprehensive data. Data-rich dashboards and thematic insights offer unsurpassed depth and breadth at the industry, sector and company levels, thus enabling Bloomberg clients to work more efficiently and ensure that they make more informed strategic decisions. Covering more than 100 industries, we put the data, analytics and insight at the fingertips of family offices to facilitate creative investment ideas and simplify strategic and financing decisions.
IDEA GENERATION

Successful investment strategies start with ideas, but it is rigorous due diligence that determines their viability. Bloomberg provides a suite of solutions to connect the vital elements of this process. Whether screening for public securities around a theme or conducting sophisticated backtests, Bloomberg gives you the tools necessary to uncover the opportunity in your ideas.

INVESTING WITH IMPACT

Protecting the interests of future generations requires a greater understanding of the impact of portfolios than ever before. Bloomberg’s sustainability effort has led to a wealth of environmental, social and governance data that informs investment decisions. Available at both the security and portfolio level, family offices can now feel confident that they understand the impact of their portfolios.

Equity Screening EQS <GO>
Screen for companies that meet a customized set of criteria and backtest the results to validate your trade ideas.

Environmental, Social & Governance Resource Center
ESG <GO> ESG factors are integrated into our analytics tools, giving users a better understanding of the risks and opportunities associated with potential investments.
MANDATES

Whether seeking new managers, investigating emerging strategies or looking to deploy capital into alternative investments with longer track records, Bloomberg’s Mandates solution offers a discreet platform to begin due diligence. When considering club deals or co-investments, our private equity platform offers the potential to find like-minded investors ranging from other families to endowments and more. Moreover, when considering a private investment, we offer a platform for performing comprehensive analysis on the industry in which a company operates—revealing barriers to entry, the dynamics of the sector, macroeconomic drivers, regulatory issues and, ultimately, an exit strategy.

A MULTI-ASSET CLASS PLATFORM

The Bloomberg Professional service covers every asset class—from fixed income to equities, foreign exchange to commodities, derivatives to mortgages—along with execution platforms that deliver the optimal blend of data, integration, connectivity and ease of use to achieve best execution.
GLOBAL FIXED INCOME

For more than 30 years, Bloomberg has been the go-to resource for global fixed income investments. Whether monitoring the performance of fixed income markets, comparing current and historical spreads or graphing yield and spread data, Bloomberg offers the most comprehensive and reliable coverage, supported by unmatched security-level data. Country-specific views further demonstrate how our enhanced functionalities and fully integrated platform enable you to manage more information, perform deeper analyses and gain a macro view of the complete fixed income picture.

PROTECTION

Bloomberg’s Portfolio & Risk Analytics solution empowers family offices to take control of the analytics, data and news that impacts their portfolios. Offering unmatched transparency into a portfolio’s performance, characteristics and risk, this multi-asset class solution delivers the insight required to create and execute differentiating investment strategies.

Bloomberg is committed to adding greater clarity to portfolios, thus ensuring confidence in rebalancing decisions. Bloomberg can collectively analyze multiple accounts and measure market-related and security-specific risks. Bloomberg Portfolio & Risk Analytics is fully integrated with the Bloomberg Professional service, which provides unparalleled access to comprehensive market and security data and a broad range of sophisticated tools required by family offices.
EXPERTISE
Bloomberg Business solutions connect industry professionals to an unprecedented level of data, analysis and specialized insight. Our ability to take large amounts of disparate data and news and transform them into useful and actionable insights empowers professionals across industries.

Bloomberg BNA
A leading source of legal, tax, regulatory and business information for professionals, Bloomberg BNA delivers expert analysis, news, practice tools and guidance. Bloomberg BNA's coverage spans the full range of legal practice areas, including tax & accounting, labor & employment, intellectual property, banking & securities, employee benefits, health care, privacy & data security, human resources, and environment, health & safety.

Bloomberg Law
Bloomberg Law is a legal and business intelligence, news and research system designed for leading legal professionals. Integrating Bloomberg’s renowned news, company and financial data with exceptional primary and secondary legal research and business development tools, Bloomberg Law delivers an advantage to legal professionals who handle the most complex legal matters.

Bloomberg Government
Bloomberg Government delivers data, analytical tools, news and insight so you can understand the business impacts of government actions. From high-level overviews to granular details, Bloomberg Government conveniently integrates exclusive industry information and insights, up-to-date legislative and regulatory data, searchable contract and grant opportunities, detailed company, state and district profiles, and official source documents.

Bloomberg New Energy Finance
Bloomberg New Energy Finance 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. We have the largest team of experts based across Europe, the Americas, Asia and Africa, analyzing and publishing intelligence about the emerging energy markets.

SERVICE
Everything we do is delivered with a deep understanding of the family office environment, needs and expectations— built on years of strong relationships. Our content experts are available when you need them, so you can get your questions answered quickly and accurately and make decisions with confidence.
ABOUT THE BLOOMBERG PROFESSIONAL SERVICE

The founding vision in 1982 was to create an information services, news and media company that provides business and financial professionals with the tools and data they need on a single all-inclusive platform. The success of Bloomberg is due to the constant innovation of our products, unrivaled dedication to customer service and the unique way in which we constantly adapt to an ever-changing marketplace. The Bloomberg Professional service is a powerful and flexible tool for financial professionals—whatever their needs—in cash and derivatives markets as diverse as equities, currencies, commodities, money markets, government and municipal securities, mortgages, indices, insurance, and legal information. The Bloomberg Professional service seamlessly integrates the very best in real-time data, news and analytics.

In addition, Bloomberg users benefit from on-demand multimedia content, extensive electronic trading capabilities and a superior communications platform. Bloomberg customers include influential decision makers in finance, business and government. Business and financial professionals recognize the Bloomberg Professional service as the definitive tool for achieving their goals because it offers unparalleled assistance and functionality on a single platform for a single price.

Real Service from Real People When You Need It.
Our 24/7 industry-leading customer service teams in 160 countries around the world will help you fully leverage the analytics and data on the Bloomberg Professional service.
To learn more about Bloomberg’s Solutions for the Family Office, contact your regional sales representative or visit us at bloomberg.com/professional.