



# THINK FORWARD

## CONTENTS

Welcome to the Bridges Investment Management Quarterly Newsletter – Think Forward. Our goal is that this newsletter will be a useful tool to keep in touch with you.

If you would like to receive this newsletter by email, please send us a message at [contact@bridgesinv.com](mailto:contact@bridgesinv.com) or sign up on our website.

Thanks and happy reading!

### 1 NEW NAME, SAME TRUSTED PARTNER

### 2 BIM MAKES 2017 FINANCIAL TIMES TOP 300 FINANCIAL ADVISERS LIST

### 3 LETTER FROM THE CEO

## NEW NAME, SAME TRUSTED PARTNER

BY BRIAN R. MILES



I'm very pleased to announce that as of August 1, 2017, Provident Trust Company is now Bridges Trust Company! The name change became effective after formal approval was received from the Nebraska Department of Banking and Finance on July 25, 2017.

Although our name has changed, we remain committed to serving our client's trust and wealth management needs in the same way that we always have, by providing thoughtful and timely customer service while delivering the following fundamental objectives:

**WE PROTECT THE FINANCIAL WELL-BEING OF OUR CUSTOMERS SO THAT THEY CAN TAKE CARE OF THE PEOPLE AND THINGS THAT MATTER MOST.**

- To provide exceptional and innovative investment management and trust services that are fully integrated with, and individually tailored to, each customer's unique needs.
- To deliver an unrivalled customer experience by providing thorough, timely and attentive client service.
- To leverage the synergies between investment management, estate planning, tax planning and philanthropic planning to seize opportunities, increase efficiencies and accomplish extraordinary results for our customers.
- To be fully transparent and accountable to our customers in everything that we do.

We feel that changing the name Provident Trust Company to Bridges Trust Company provides the opportunity to align our companies under a common brand that

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QUARTERLY NEWSLETTER

# THINK FORWARD

Please contact us if you'd like more information about how Bridges Investment Management, Inc. can help you meet your long-term financial objectives.

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Continued from previous page

truly embodies the core values on which our founder, Edson L. Bridges II, built the business – trust, service, excellence and integrity. It is those fundamental values that drive our focus on delivering comprehensive trust and wealth management services, while providing an exceptional customer experience and building enduring relationships with our clients for years to come.

We are extremely proud of our firm's story. It's a story of faith, service and an unyielding commitment to ethical behavior. But most of all it's a story of trust. It's that foundation of trust upon which we will build the next chapter of the Bridges story.

And it's on that trusted relationship, forged over the years, that our customers can count on to know that we will always put their best interest ahead of our own.

Please be sure to visit our new website [www.bridgestrust.com](http://www.bridgestrust.com) to find the latest news and information about our company.

## BIM MAKES 2017 FINANCIAL TIMES TOP 300 FINANCIAL ADVISERS LIST



FT 300 Ranking June 2017

We are excited to announce that Bridges Investment Management has again been named as one of the Financial Times Top 300 Registered Investment Advisers in America. This year, the firm is one of just two Nebraska-based firms to be recognized for this prestigious honor.

This is the fourth annual listing of Top Registered Investment Advisers (RIAs) ranked by the Financial Times. The publication considers these firms to be the very best across the U.S. In order to qualify, RIAs must be registered with the U.S. Securities and Exchange Commission (SEC) and have a minimum of \$300 million or more in assets under management (AUM).

The 2017 Financial Times 300 Top Registered Investment Advisors is an independent listing produced by the Financial Times (June, 2017). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. As identified by the Financial Times, the listing reflected each practice's performance in six primary areas, including assets under management, asset growth, compliance record, years in existence, credentials and accessibility. Neither the RIA firms nor their employees pay a fee to The Financial Times in exchange for inclusion in the FT 300.

## MARKET SAVVY AND SOCIAL, TOO.

Be sure to like us on Facebook and follow us on LinkedIn to stay up to date on key economic news.



## LETTER FROM THE CEO

BY TED BRIDGES



I'm very happy to report that on August 1, 2017, Bridges Investment Management and Bridges Trust Company officially joined forces to create a platform to provide comprehensive, multigenerational trust and wealth management services! We believe that this partnership is important to our clients and our firm for several reasons:

1. The partnership secures the future of our firm by solidifying the culture, values and sound business operating principles that have contributed to the success of the Bridges organization over the past six decades.
2. We feel the partnership allows us to scale our service platform significantly and efficiently, so that we can more effectively provide continuous innovation and improvements in trust administration, investment management and client service.
3. We believe the partnership will allow us to attract and retain outstanding people and invest in technology that will significantly improve our operation and enhance the client experience.
4. We feel that the partnership will allow our firm to expand our client service capabilities, leverage investment expertise and continue our pattern of growth, while maintaining a commitment to capital preservation, long-term investing and conducting business with integrity.

Through the partnership, we are forming a new entity that will wholly own Bridges Investment Management and Bridges Trust Company. Edson L. Bridges II will serve as co-chairman of the combined organization. I will continue as CEO of the firm and the current Bridges management and client service team will remain in place. Although the structure of our firm has changed, it's important to note that our core trust, investment management and client service model will not change. We will continue our unyielding focus on earning and maintaining the trust of our clients, through excellent investment management, exceptional client service and the development of long-term relationships that facilitate our ability to meet and exceed our clients' investment objectives and service requirements.

Our vision is to provide comprehensive trust, family office and wealth management solutions for a growing client base of successful individuals and families, endowments and foundations, business owners, entrepreneurs and corporations for years to come. Our primary focus will be to provide these services for high net worth families, meeting their day-to-day needs in the areas of investment management, trust administration, family foundation management, tax planning, charitable planning and family office services, coordinated with the many professionals engaged in serving our client base. We feel that the partnership will allow us to develop a broad service platform that is currently unavailable to high net worth and ultra-high net worth individuals and families in the region and we are truly honored and excited to be able to offer these valuable services to our existing clients and to new clients alike.

We believe the future is very bright for our company as it moves into a new chapter in its history and we are anxious to continue to invest in our business, our technology and our people in order to build the premier investment management, trust and family office enterprise in the region.

We would encourage you to contact us to find out more about the transaction, and how we plan to leverage our platform to enhance and improve the quality, depth and breadth of our services.