



The Private Bank Group



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Welcome! Bienvenue! ¡Bienvenido!

Dear valued client,

Thank you for considering our services. We are grateful that you were referred to us and pledge to tend to you and your companies with the same diligence, aplomb and passion for which we are so well known.

In the following pages, you will learn about our birth and growth, serving distinctive and demanding clients like yourselves. Through case studies, you will discover how we listened to client needs and successfully delivered on time and well beyond the call of duty.

We always appreciate your kind referrals to other family members, associates and friends.

The very best of health, wealth and happiness to you and yours. Thank you kindly.

Kurt F. Matthew, Jr.

Partner



Overview of Services

US - International

investment / portfolio management

banking

formation and administration of special purpose vehicles / captive finance companies

private equity funds

hedge funds

corporate / company secretary services

CEO, CFO and CAO (chief administrative officer) services

administrator over closely-held business interests, private partnerships



Curriculum Vitae of managing partner Kurt Francis Matthew, Jr.

PROFESSIONAL EXPERIENCE

The Private Bank Group, managing partner and chairman (2002 - present)

Geneva, Switzerland - acquisition and management of hedge funds and private equity funds. Formation and administration of Switzerland based private banks, trust companies, brokerage houses, special purpose vehicles, captive finance companies

KF Matthew & Co, founder and chairman (1992 - present)

Holding company for SEC Registered Investment Advisor firms that manage money for institutions and individuals. The firm previously operated as a NY state RIA firm representing the interests of its foreign investors in the USA.

Salomon Smith Barney, financial consultant (1998 - 2000)

Placed US physicians and retired entrepreneurs in 'wrapped fee' asset management programs, private equity and hedge fund products. Attained series 7, 63 and 65 securities licenses. Achieved personal goal of getting exposure to US clients, receiving training and sales experience from a major US brokerage firm.

Citibank, relationship manager (1987 - 1990)

Relationship manager focused on: traditional lending to multinational corporations and governments; project financing, securitized lending to government entities and multinationals and selling investment and hedging products to wealthy individuals and corporations.



EDUCATION

Institute of Chartered Secretaries and Administrators, United Kingdom

Chartered / Corporate Secretary (ACIS) candidate

Harvard University (1990 – 1991)

Graduate Diploma - graduate level business program in the fields of finance, economics, marketing, and management.

Miami University, Ohio (1983 - 1986)

B.Sc. in Business Administration, with concentrations in finance and accountancy

Trinity College (1974 - 1981)

Cambridge University (UK) – Ordinary and Advanced level diplomas

Foreign language proficiency and travel

Fluent in French and Spanish (in addition to English)

Travel extensively throughout Europe, the Caribbean, South America and the USA

Special interests

Mentor and spiritual leader to children. Member of Gallon Club at a blood donation bank

Hobbies

Reading, jogging and bicycling

Citizenship

United States of America



MEMBERSHIPS

Harvard Club of New York

National Arts Club, NY

Rotary Club of Wall Street (founder and past president)

Knights of Columbus (Grand Knight, twice)

SPONSORED SPEAKING ENGAGEMENTS

KPMG LLP

Salomon Brothers

Harvard Club of New York

Van Eck Funds

Rotary Club

National Association of Black Accountants

Women's Financial Empowerment Club

Genesis Investment Club

Reveille Club