BRYN MAWR TRUST®

A WSFS COMPANY

YOUR JOURNEY.
OUR COMMITMENT.

Private Wealth Management

Financial Planning and Advice

For generations, individuals, institutions, and families have turned to Bryn Mawr Trust. Your financial journey comes with its own set of goals, challenges, and opportunities, and our commitment is to help you achieve lasting financial security through collaborative advice and planning with the guidance, care, and support you deserve.

Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses on your needs, wants, and long-term goals. Our team approach brings together expertise in areas such as investments, trusts, financial planning, legacy and retirement planning, business succession planning, and tax strategies.

[$97.6 BILLION]

IN ASSETS UNDER MANAGEMENT AND ADMINISTRATION*

as of March 31, 2026

Our Process

Wealth management begins with understanding your values, vision and goals – that is why we begin with a discovery process. We then integrate the financial strategies and solutions that align with them.

1. Discovery
2. Design
3. Execution
4. Administration

Capabilities services

Providing expert service and customized solutions.

- Financial planning
- Investment management
- Personal trust and estate planning
- Customized private banking services including deposit, liquidity and credit solutions
- Workplace retirement solutions for businesses
- Endowments and foundations
- Holistic planning in advance of a partial liquidity event, generational transition or sale of a business
- Specialized trust services in Delaware and Nevada
- Tax planning and bill pay
- Special needs trusts and guardianships
- Retirement, income and distribution planning
- Business Planning: Exit and Business Succession

Is Bryn Mawr Trust Right for You?

We believe that you should work with advisors that can perfectly align with your needs and expectations. To facilitate this, we encourage you to take advantage of a complimentary review to determine if we are a good fit.

Contact us today at 833.973.7633

bmt.com

*Bryn Mawr Trust: $6.73B, Bryn Mawr Trust Advisors: $3.53B AUM and $905M AUA, The Bryn Mawr Trust Company of Delaware: $56.03B, WSFS Institutional Services: $30.43B as of March 31, 2026.

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