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For Immediate Release

**INSTITUTE FOR PRIVATE INVESTORS
ANNUAL FAMILY PERFORMANCE TRACKING SURVEY:
UHNW INVESTORS INCREASE COMMODITIES,
REAL ESTATE ALLOCATION**

**Ultra-wealthy investors decrease hedge funds
Investors concerned about geopolitical risk**

NEW YORK, June 5, 2012 – Ultra-high net worth investors favor commodities and real estate, according to the [Institute for Private Investors](#) annual Family Performance Tracking® survey. In the survey, 45% of respondents increased their allocation to commodities, 31% to real estate and 22% to private equity. Investors also increased their municipal holdings and decreased investment in hedge funds/funds of funds.

Now in its 13th year, the IPI Family Performance Tracking® survey highlights the expectations, returns and asset allocations of IPI member families. The survey is conducted in two parts. Data released earlier this year looked at families' anticipated investment strategies. The FPT follow-up, completed in April, measures UHNW investors' actual allocation and performance.

IPI, a subsidiary of [Campden Wealth](#), provides investment education and networking resources to its national membership of about 345 ultra-high net worth private families. IPI member families have minimum assets of \$30 million, and four in ten families have assets of \$200 million or more. 57 families responded to the survey, conducted via member questionnaires.

“This year’s data reinforced the investment trends we have been seeing among the ultra-affluent as far as the rise in allocation to commodities and real estate, and the continuing popularity of direct investment in private companies,” said Mindy Rosenthal, IPI executive director. “Families are also concerned universally about risk, both abroad and at home.”

In other findings:

- 70% of families expressed concern about geopolitical risk and domestic policy shifts. 48% said they were concerned about finding opportunities for yield.
- 62% of respondents reported employing an advisor for more than 50% of their wealth, an all-time high from past surveys.
- About half of the families said they were “staying the course” in terms of their investments, rather than trying to time the market.
- Families’ returns for 2011 varied widely, from -10% to +25.10 net of fees. However, the majority of IPI families reported 2011 returns net of fees between -2.16% and +2.28%. The five-year average was +2.40% net of fees. Families who sought principal protection fared better in 2011 – almost two-thirds reported positive returns – than those who cited growth as their objective. Of those, not quite half saw positive returns in 2011.

IPI’s Family Performance Tracking results will be among the topics discussed at its upcoming family forum in Chicago in July. Approximately 80 IPI member families are based in the Midwest, with about 40 in Chicago and surrounding areas, Rosenthal said.

About IPI

The Institute for Private Investors (IPI) (www.memberlink.net) is a trusted provider of educational and networking resources for ultra high-net-worth investors and operates as an independent U.S. subsidiary of Campden Wealth. Celebrating its 20th anniversary in 2012, IPI provides a safe haven for investors to communicate with each other, and their advisors, about their wealth management approach. IPI offers education and an online network to 1,100 investors and has offices in New York and San Francisco. In 1999, IPI created the nation’s first private wealth management curriculum for principals and continues to collaborate on weeklong programs with The Wharton School at the University of Pennsylvania. An affiliated company, the Investor Education Collaborative, LLC, was formed in 2004 to offer experiential educational formats and online classes.

About Campden Wealth

Campden Wealth (www.campdenwealth.com), founded in 1987, provides education, news, research, conferences and other networking opportunities to principals of ultra high-net-worth financial and business-owning families, and the family office executives and trusted advisors who serve them. Campden produces global conferences and proprietary research serving the ultra high-net-worth, multigenerational family community, as well as *Campden FO* (Family Office) and *Campden FB* (Family Business), two market-leading magazines and websites that inform this highly targeted audience. Campden Wealth is a global business with offices in London, New York and Singapore.

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