

Cresset Capital Management

A National Multi-Family
Office & Wealth
Management Firm Serving
Ultra High Net Worth
Consumers

Tiburon Written Research
October 9, 2026



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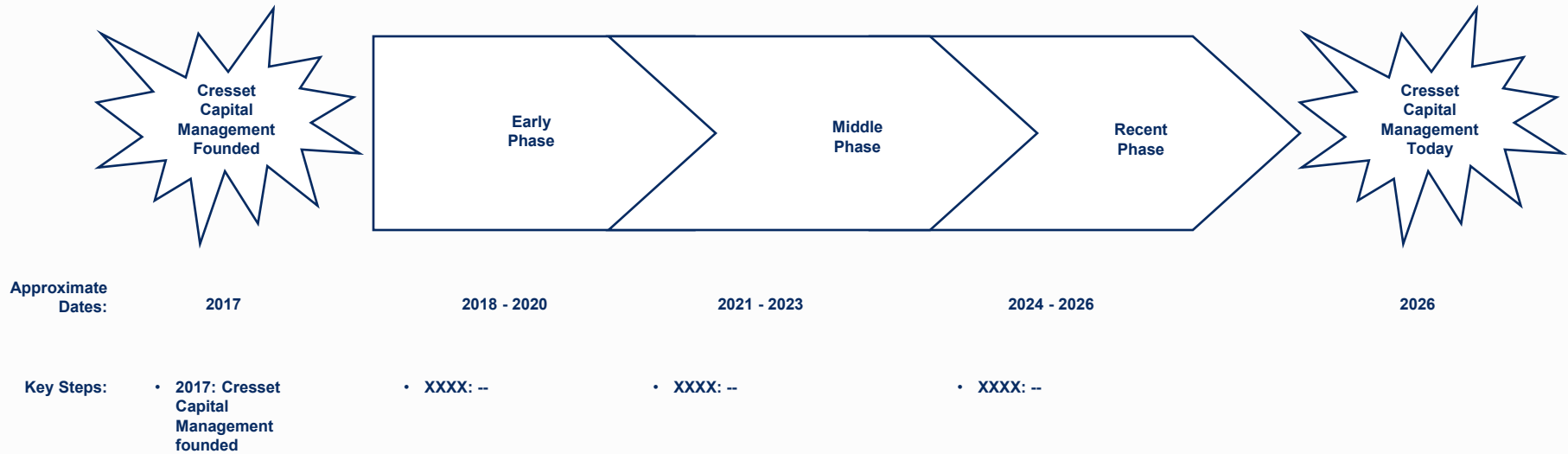


Comments

- **Founded in 2017**
 - **Founded by Eric Becker and Avy Stein**
- **Based in Chicago, IL**
- **25 offices**
- **655 employees**
- **\$88 billion assets under management**
- **CEO: Susie Cranston**
- **Privately owned**
- **Website: www.cressetcapital.com**

Cresset Capital Management was Founded in 2017 and Has Subsequently Evolved through its Early, Middle, & Recent Phases

Cresset Capital Management History



Cresset Capital Management was Founded by Eric Becker and Avy Stein in 2017



Comments

- **Founded in 2017**
 - **Founded by Eric Becker and Avy Stein**
- **Based in Chicago, IL**
- **Co-CEOs: Eric Becker and Avy Stein**
- **Privately owned**
- **Website: www.cressetcapital.com**

Cresset Capital Management is Not a Frequent Advertiser



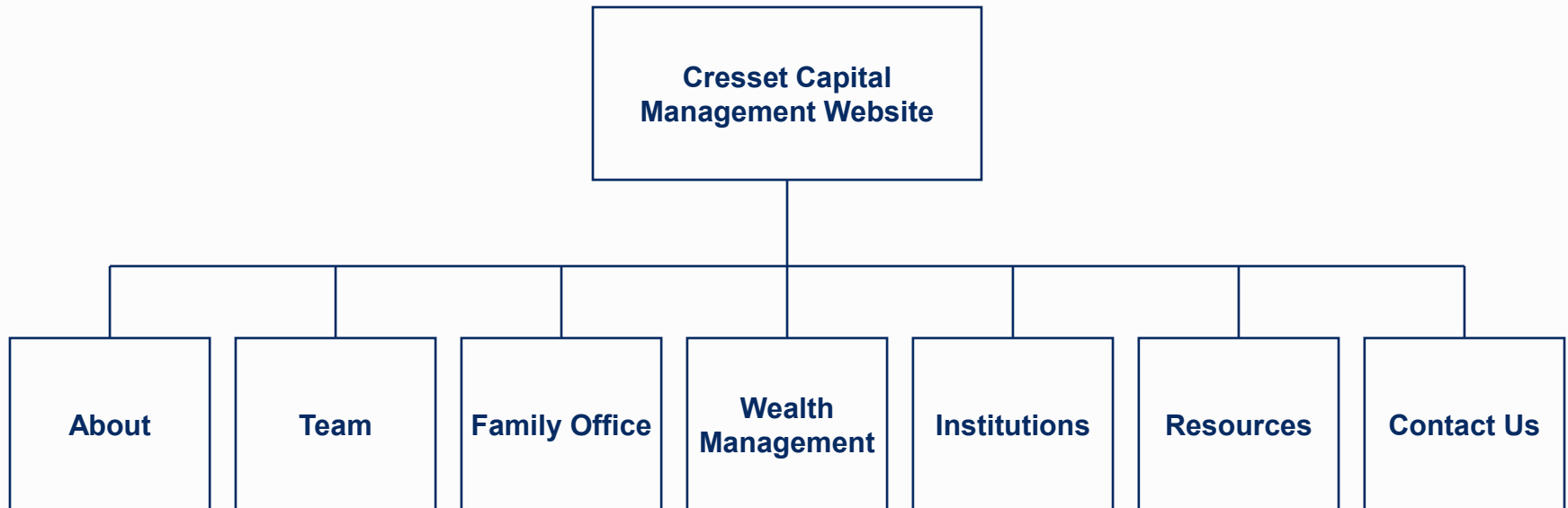
Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Has a Website with 7 Core Sections, Including About, Team, Family Office, Wealth Management, Institutions, Resources, and Contact Us



Cresset Capital Management Website



Cresset Capital Management is Not a Frequent Acquirer



Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Has a Charitable Giving Program

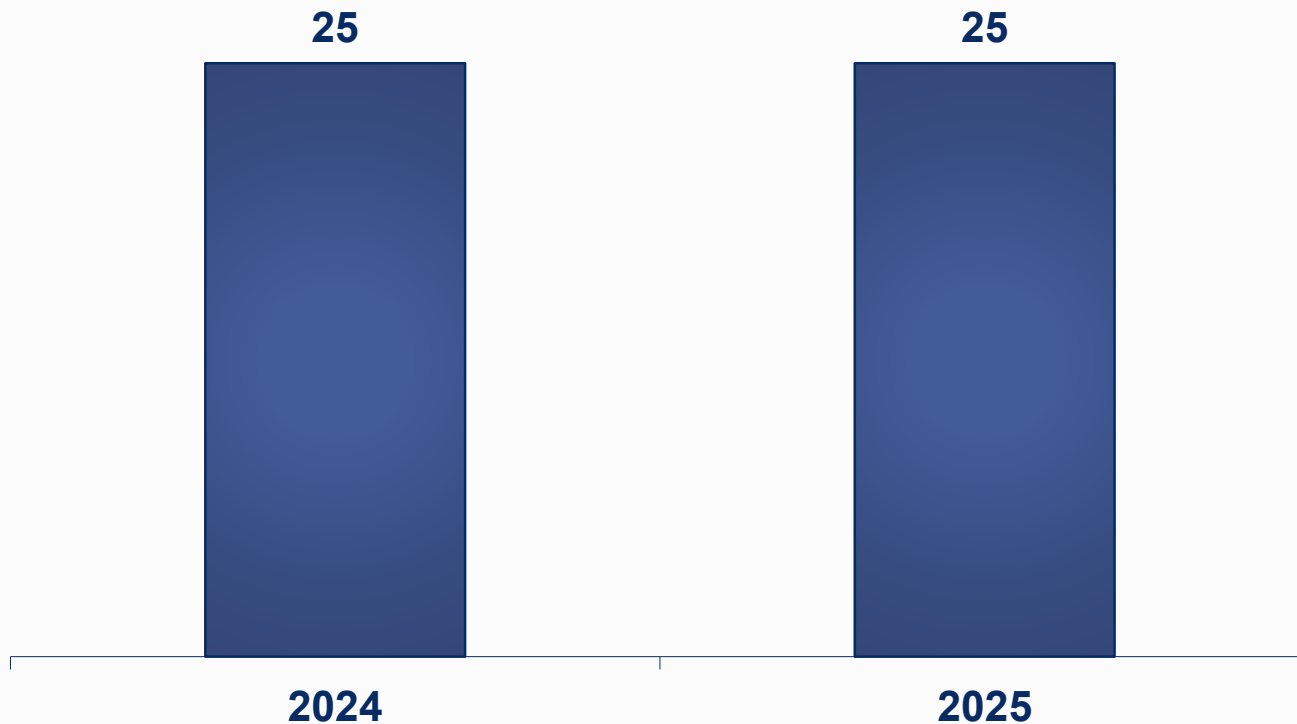


Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Has 25 Offices, Consistent Since 2024

Cresset Capital Management Offices



Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Offices

- **Phoenix, AZ**
- **Los Angeles, CA**
- **Menlo Park, CA**
- **San Francisco, CA**
- **Santa Barbara, CA**
- **Denver, CO**
- **Greenwich, CT**
- **Washington, DC**
- **Boca Raton, FL**
- **Naples, FL**
- **West Palm Beach, FL**
- **Atlanta, GA**
- **Chicago, IL**
- **Boston, MA**
- **Kalamazoo, MI**
- **Minneapolis, MN**
- **Charlotte, NC**
- **New York City, NY**
- **Cleveland, OH**
- **Tulsa, OK**
- **Sioux Falls, SD**
- **Nashville, TN**
- **Austin, TX**
- **Dallas, TX**
- **Houston, TX**

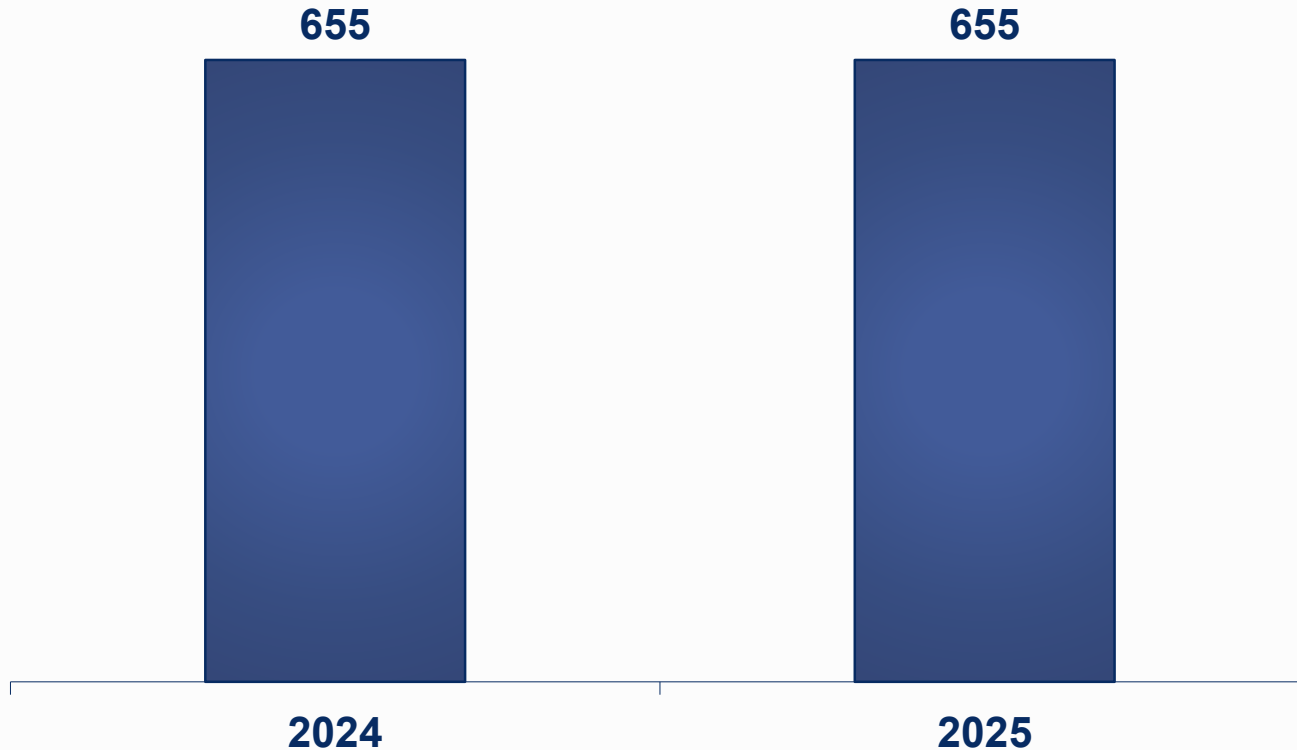


Cresset Capital Management Has 655 Employees, Consistent Since 2024



CRESSET®

Cresset Capital Management Employees

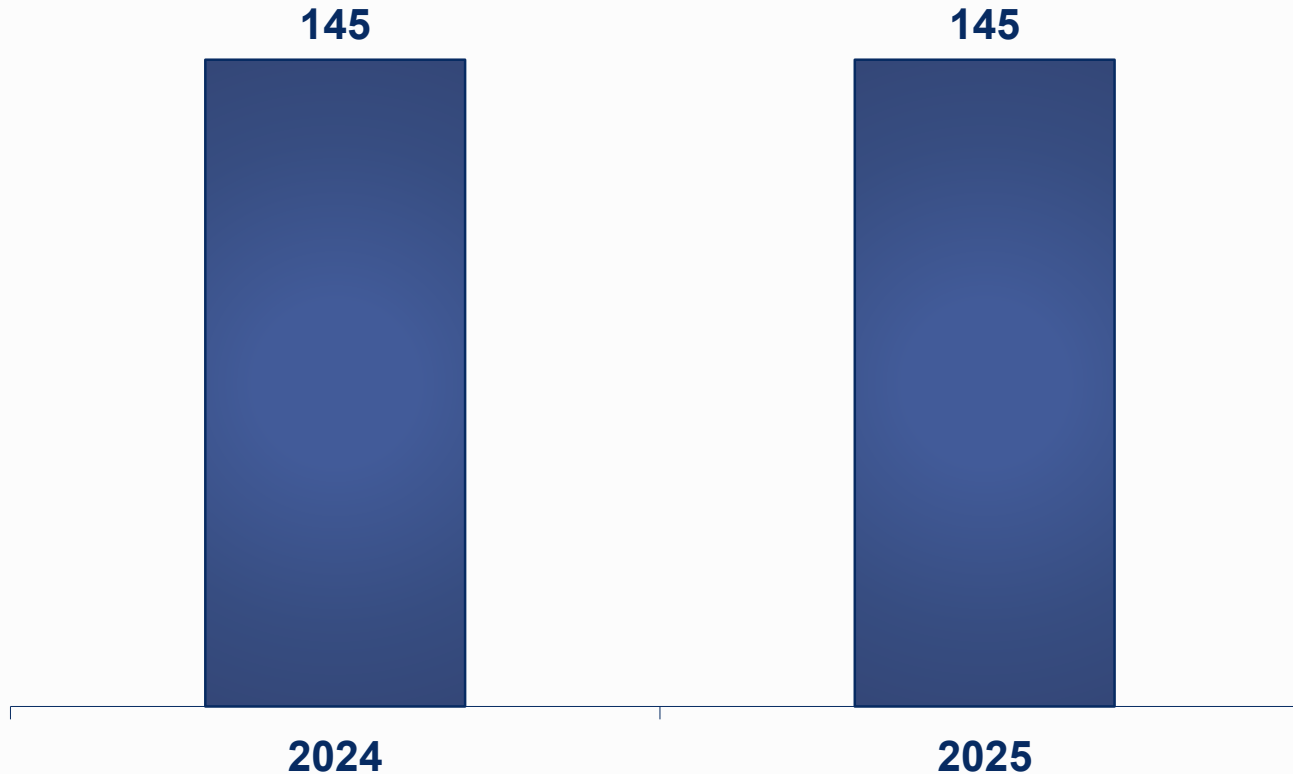


Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Has 145 Funds



Cresset Capital Management Funds



Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Institutional Clients



2024

2025

Cresset Capital Management Institutional Clients

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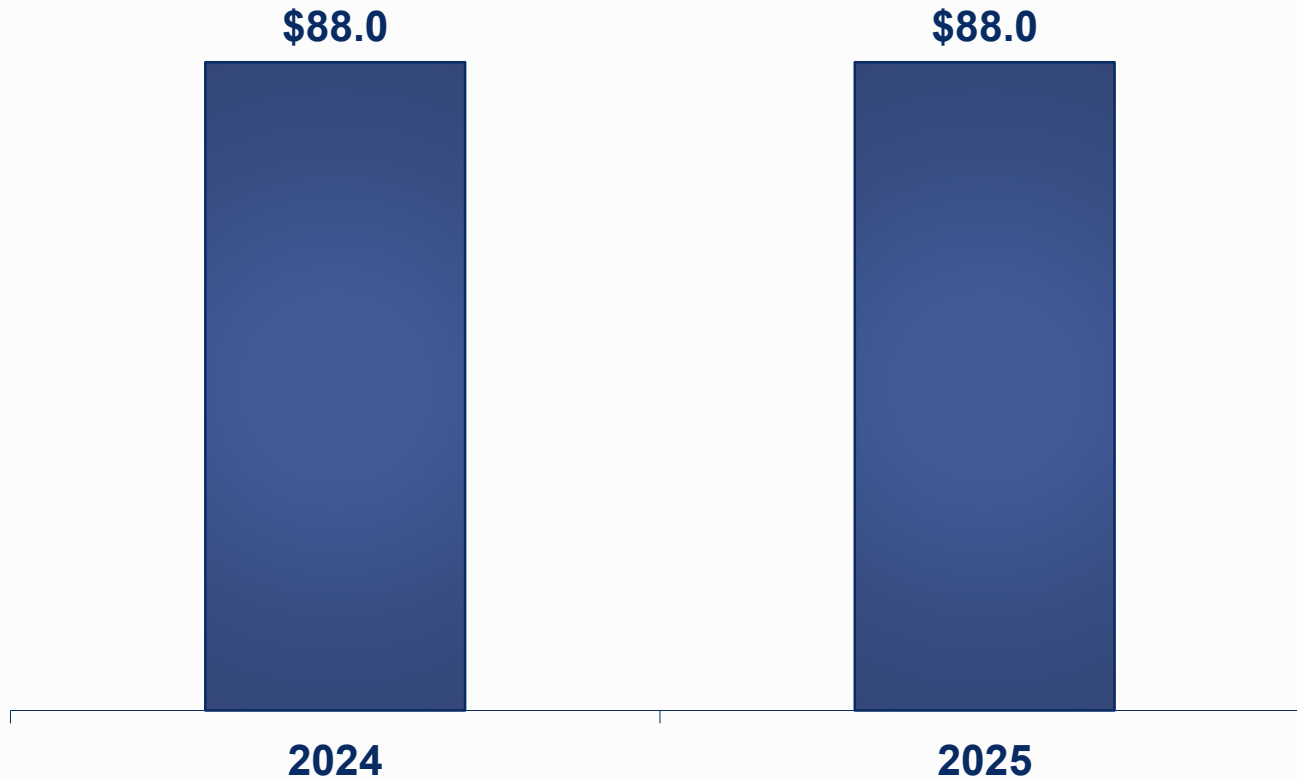
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Cresset Capital Management Has Gathered \$88.0 Billion Assets Under Management, Consistent Since 2024

Cresset Capital Management Assets Under Management (\$ Billions)



Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Revenues (\$ Millions)



2024

2025

Cresset Capital Management Earns \$____ Million Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)

Cresset Capital Management Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) (\$ Millions)



2024

2025

Cresset Capital Management Earns \$____ Million

Cresset Capital Management Net Profits (\$ Millions)

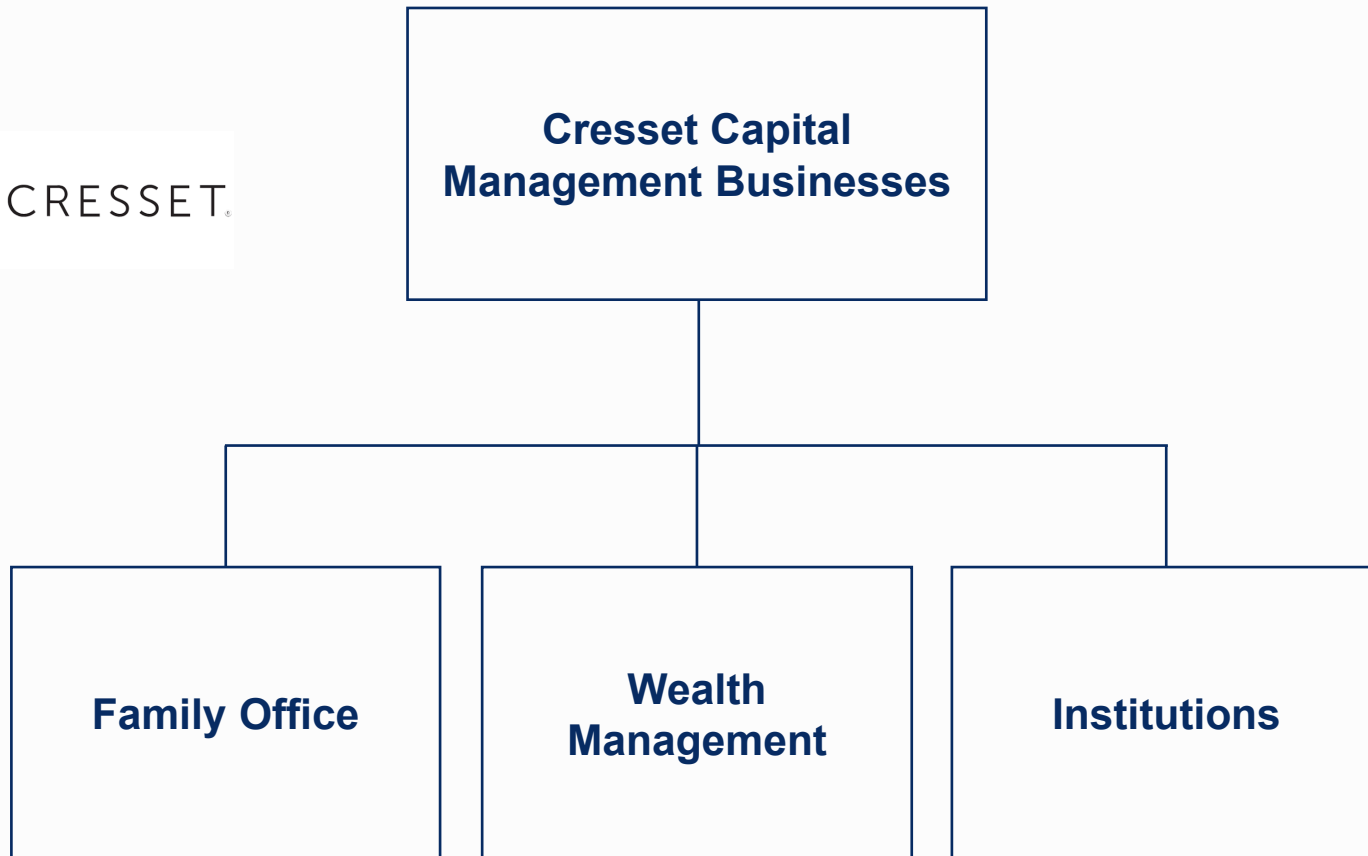


2024

2025

Cresset Capital Management Has a Number of Businesses, Including Family Office, Wealth Management, & Institutions

Cresset Capital Management Businesses



Cresset Capital Management’s First Business is Family Office



Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management's Family Office Has Employees

Cresset Capital Management Family Office Employees



2024

2025

Cresset Capital Management's Family Office Has Gathered Assets Under Management

Cresset Capital Management Family Office Assets Under Management (\$ Billions)



2024

2025

Cresset Capital Management Family Office Net Flows (\$ Millions)



2024

2025

Cresset Capital Management's Family Office Generates Revenues

Cresset Capital Management Family Office Revenues (\$ Millions)



2024

2025

Cresset Capital Management's Family Office Earns \$__ Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)

Cresset Capital Management Family Office Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) (\$ Millions)

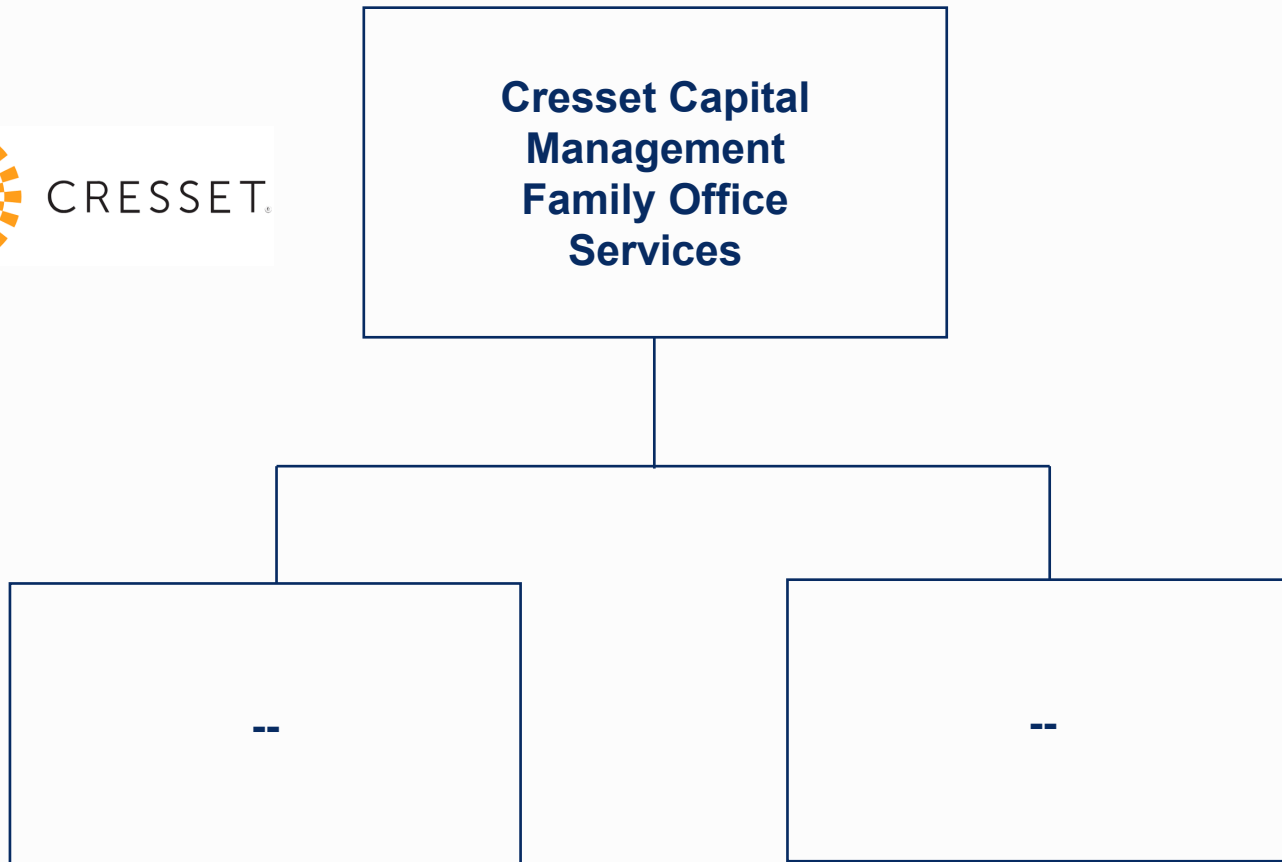


2024

2025

Cresset Capital Management's Family Office Business has Two Services, Including ...

Cresset Capital Management Family Office Services



Cresset Capital Management’s Family Office’s First Service is ...



Comments	
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Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management's Second Business is Wealth Management



Comments
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Cresset Capital Management Wealth Management Employees



2024

2025

Cresset Capital Management's Wealth Management Has Gathered Assets Under Management

Cresset Capital Management Wealth Management Assets Under Management (\$ Billions)



2024

2025

Cresset Capital Management's Wealth Management Gathers Net Flows

Cresset Capital Management Wealth Management Net Flows (\$ Millions)



2024

2025

Cresset Capital Management's Wealth Management Generates Revenues

Cresset Capital Management Wealth Management Revenues (\$ Millions)



2024

2025

Cresset Capital Management's Wealth Management Earns \$__ Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)

Cresset Capital Management Wealth Management Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) (\$ Millions)

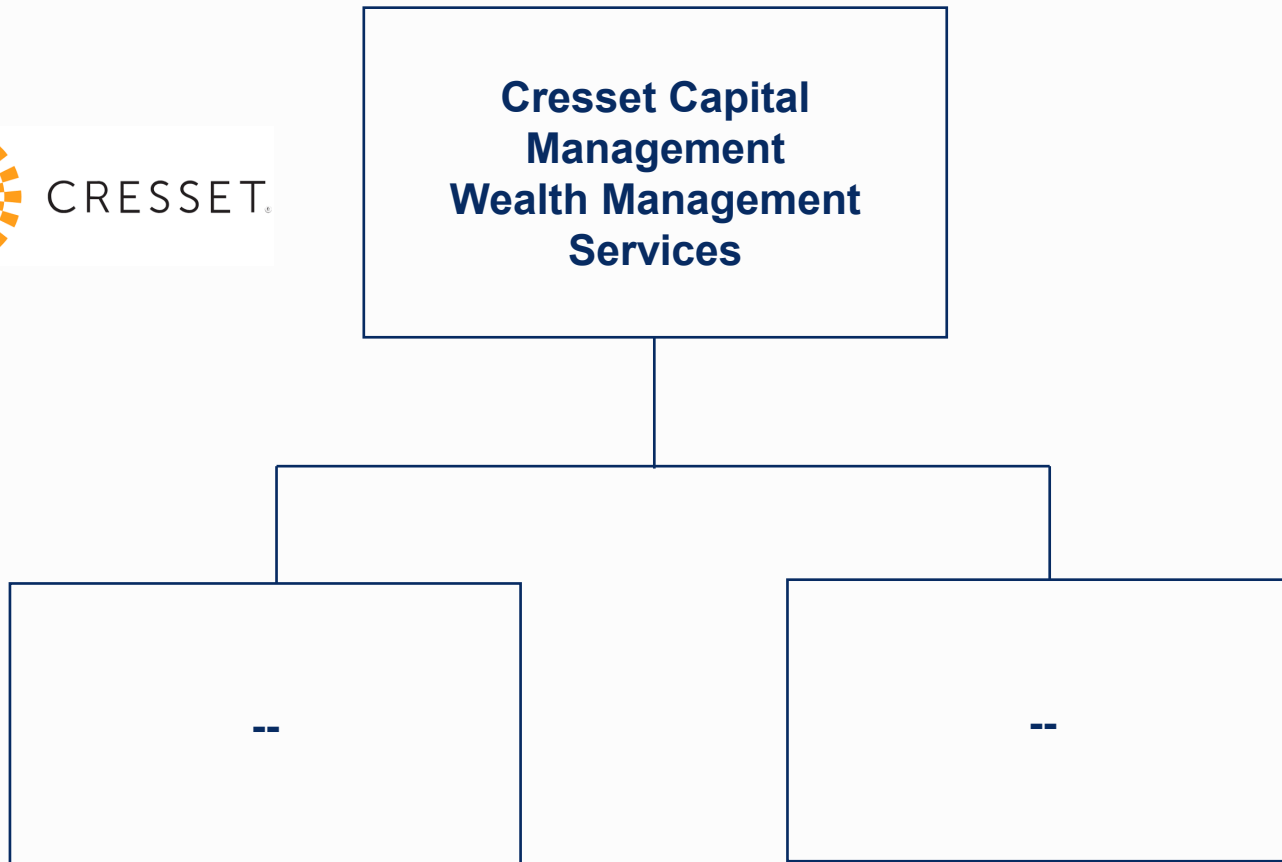


2024

2025

Cresset Capital Management's Wealth Management Business has Two Services, Including ...

Cresset Capital Management Wealth Management Services



Cresset Capital Management's Wealth Management's First Service is ...



Comments

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Cresset Capital Management’s Wealth Management’s Second Service is ...



Comments
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management’s Third Business is Institutions



Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management's Institutions Has Employees

Cresset Capital Management Institutions Employees



2024

2025

Cresset Capital Management's Institutions Has Gathered Assets Under Management

Cresset Capital Management Institutions Assets Under Management (\$ Billions)



2024

2025

Cresset Capital Management Institutions Net Flows (\$ Millions)



2024

2025

Cresset Capital Management's Institutions Generates Revenues

Cresset Capital Management Institutions Revenues (\$ Millions)



2024

2025

Cresset Capital Management's Institutions Earns \$__ Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)

Cresset Capital Management Institutions Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) (\$ Millions)

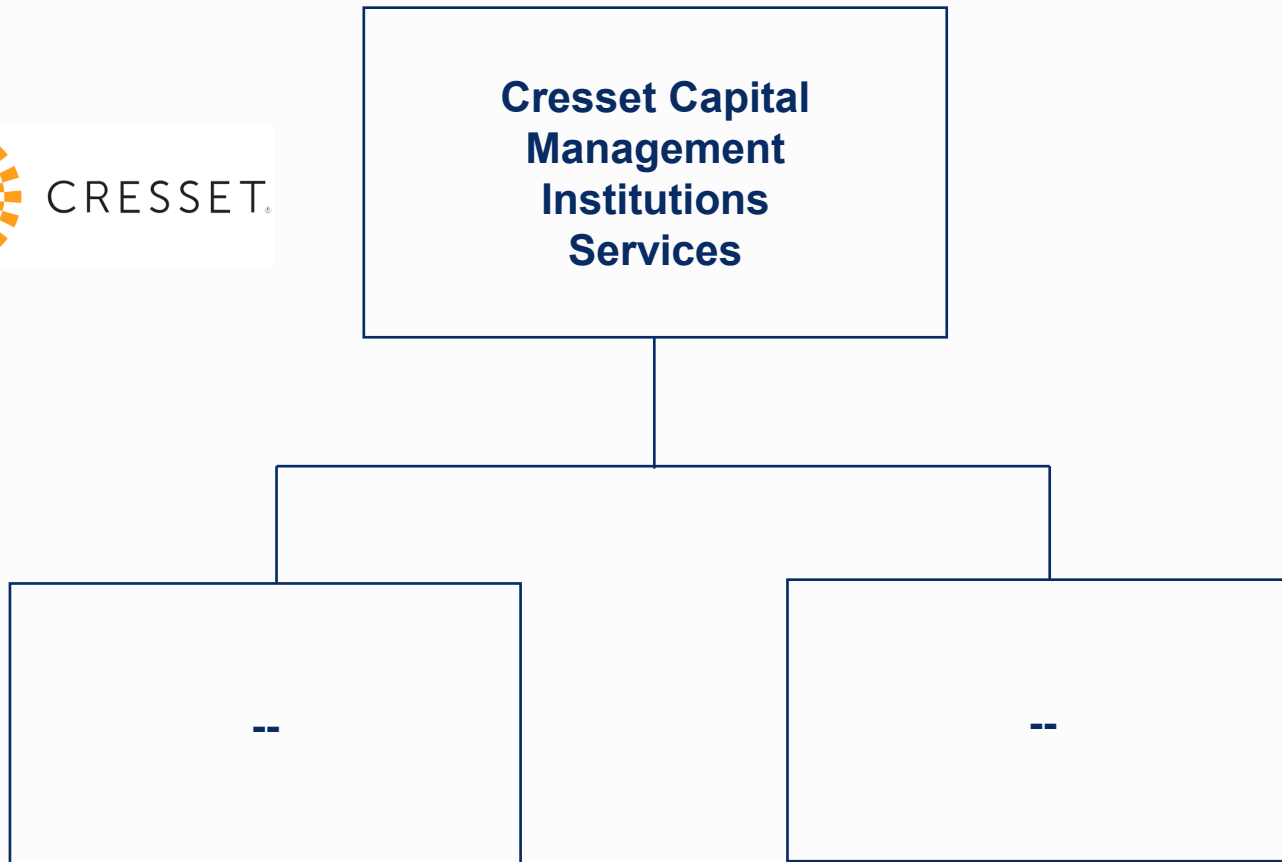


2024

2025

Cresset Capital Management's Institutions Business has Two Services, Including ...

Cresset Capital Management Institutions Services



Cresset Capital Management’s Institutions’ First Service is ...



Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management’s Institutions’ Second Service is ...

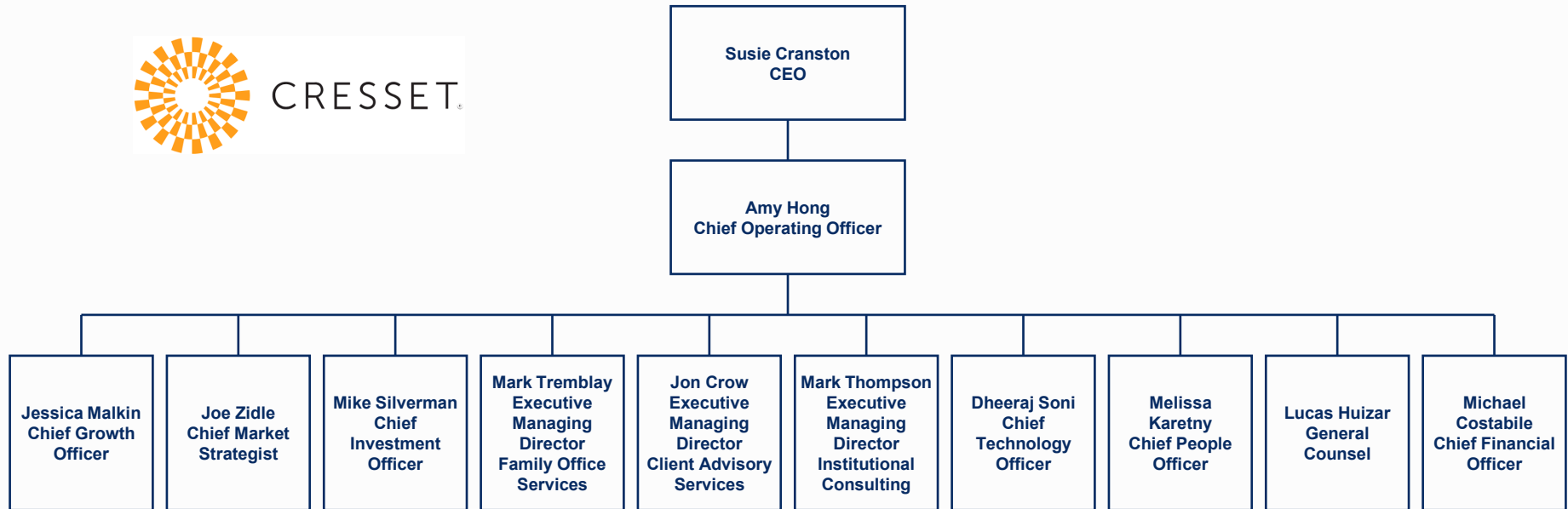


Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management is Led by its CEO Susie Cranston & Chief Operating Officer Amy Hong

Cresset Capital Management Organizational Chart



Note: Susie Cranston was formerly at First Republic Bank, JP Morgan Chase & Company, & McKinsey & Company; Amy Hong was formerly at Barclays Global Investors, Ernst & Young Global Limited, First Republic Bank, ING Investment Management, JP Morgan Chase & Company, & Prudential Financial; Jessica Malkin was formerly at Chicago Ideas & Uptake Technologies; Joe Zidle was formerly at Bank of America Corporation, Blackstone, Richard Bernstein Advisors, & Zidle Macro Strategy Group; Mike Silverman was formerly at CH Investment Partners, Crow Holdings, & Wyndham International; Mark Tremblay was formerly at Bessemer Trust & Monitor Group; Jon Crow was formerly at Sargent Management Company; Mark Thompson was formerly at Alex. Brown & Sons, Morgan Stanley, & Raymond James Financial; Dheeraj Soni was formerly at First Republic Bank & JP Morgan Chase & Company; Melissa Karetny was formerly at Alloy Inc., Citigroup, First Republic Bank, JP Morgan Chase & Company, Macy's Inc., & Viacom; Lucas Huizar was formerly at CircleUp Network, Electronic Arts, Farella Braun + Martel LLP, Guideline, & Gusto; Michael Costabile was formerly at Arthur Andersen & Company, Intalere, & Moneta Group

Source: 10/9/26 Real Assets Adviser; 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Has a Board of Directors Led by its Co-Chairs Eric Becker, Avy Stein, & Doug Regan

Cresset Capital Management Board of Directors

Eric Becker (Co-Chair)	Avy Stein (Co-Chair)	Doug Regan (Co-Chair)	--	--
• Co-Founder, Cresset Capital Management • Joined board in 2017	• Co-Founder, Cresset Capital Management • Joined board in 2017	• Founding Partner, Cresset Capital Management • Joined board in 2017	• --	• --  CRESSET.

Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management is Privately Owned



Comments	
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Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Assets (\$ Millions)



2024

2025

Cresset Capital Management Liabilities (\$ Millions)



2024

2025

Cresset Capital Management Shareholders Equity (\$ Millions)



2024

2025

Cresset Capital Management Earnings Per Share



2024

2025

Cresset Capital Management Dividends Per Share



2024

2025

Cresset Capital Management Dividend Yield



2024

2025

Cresset Capital Management's Stock Price is ...

Cresset Capital Management Stock Price



2024

2025

Source: 10/9/26 Cresset Capital Management Website; Tiburon Research & Analysis

Cresset Capital Management Shares Outstanding



2024

2025

Cresset Capital Management Market Capitalization (\$ Millions)

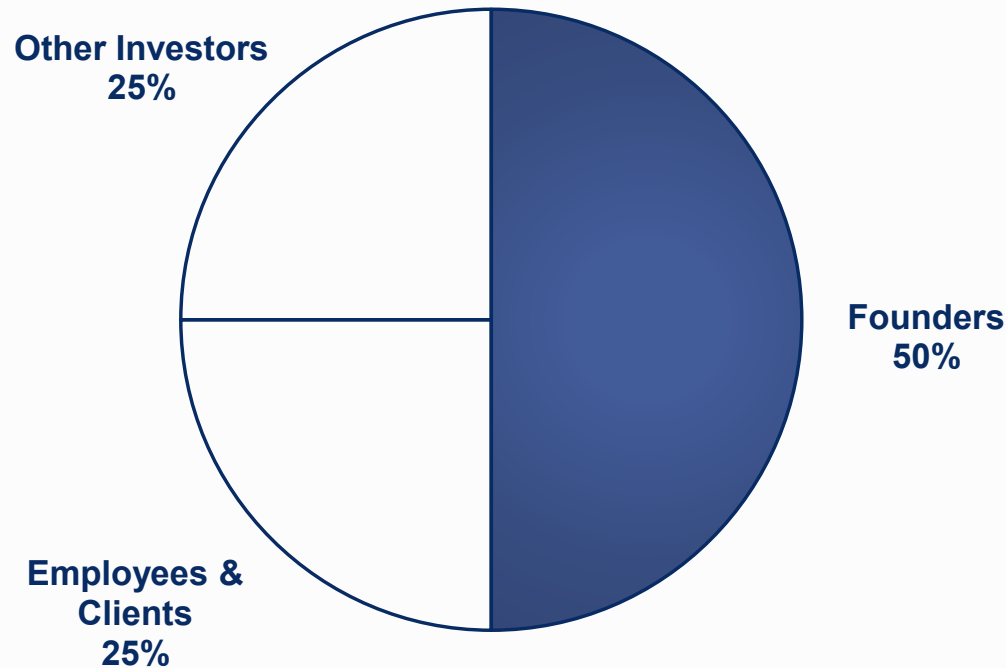


2024

2025

Cresset Capital Management is Owned by its Founders, Employees & Clients, and Other Investors

Cresset Capital Management Ownership By Owner



Cresset Capital Management's Stock Volume is....

Cresset Capital Management Stock Volume



2024

2025



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