

Boston Private Financial Holdings Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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Abstracts

Boston Private Financial Holdings Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Boston Private Financial Holdings Inc. and its competitors. This provides our Clients with a clear understanding of Boston Private Financial Holdings Inc. position in the Industry.

The report contains detailed information about Boston Private Financial Holdings Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Boston Private Financial Holdings Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Boston Private Financial Holdings Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios

pertaining to profitability, margin analysis, asset turnover, credit ratios, and company's long-term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes Boston Private Financial Holdings Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Boston Private Financial Holdings Inc. business.

About Boston Private Financial Holdings Inc.

Boston Private Financial Holdings, Inc. operates as the holding company in the United States. The company offers a range of wealth management services to high net worth individuals, families, businesses, and select institutions.

Segments

The company operates in three segments, including Private Banking; Investment Management; and Wealth Advisory.

Private Banking

The Private Banking Segment has four consolidated affiliate partners, including Boston Private Bank & Trust Company; Borel Private Bank & Trust Company; First Private Bank & Trust; and Charter Bank, a Washington state banking corporation. The banks are principally engaged in providing banking, commercial banking, and various other fiduciary services, including investment management, advisory, and administrative services to high net worth individuals, their families, small and medium-sized

businesses and professionals. In addition, the banks offer their clients a range of deposit and lending products. The specific mix of products, services and clientele can vary from affiliate to affiliate. The banks are located in New England, Northern California, Southern California, and the Pacific Northwest.

Investment Management

The Investment Management Segment has two consolidated affiliate partners, including Dalton, Greiner, Hartman, Maher & Co., LLC (DGHM), a registered investment adviser, and Anchor Capital Holdings, LLC (Anchor), which is the parent company of Anchor Capital Advisors LLC (Anchor Capital Advisors) and Anchor/ Russell Capital Advisors LLC (Anchor Russell), both of which are registered investment advisers (together, DGHM and Anchor are referred to as the Investment Managers). The Investment Managers serve the needs of pension funds, endowments, trusts, foundations and select institutions, mutual funds and individuals and their families throughout the United States (U.S.) and abroad. The Investment Managers focuses on equity portfolios with products across the capitalization spectrum. The specific mix of products, services and clientele varies between affiliates. The Investment Managers are located in New England and New York, with one affiliate administrative office in South Florida.

Wealth Advisory

The Wealth Advisory Segment has three consolidated affiliate partners, including KLS Professional Advisors Group, LLC (KLS), Bingham, Osborn & Scarborough, LLC (BOS), and Davidson Trust Company (DTC), all of which are registered investment advisers, with the exception of DTC, and wealth management firms (together, the Wealth Advisors). The Wealth Advisors provide planning-based financial strategies to individuals and their families, and non-profit institutions. The firms offer fee-only financial planning, tax planning and preparation, estate and insurance planning, retirement planning, charitable planning and intergenerational giving planning. The Wealth Advisors manage investments covering a range of asset classes for both taxable and tax-exempt portfolios. The Wealth Advisors are located in New York, Northern California, and Pennsylvania.

Other

As of December 31, 2009, the company held approximately 45% equity interest in Coldstream Holdings, Inc. (Coldstream). Coldstream is the parent of Coldstream Capital Management, Inc., a registered investment adviser, and Coldstream Securities, Inc., a

registered broker dealer.

Dispositions

In 2009, the company divested its interest in Westfield Capital Management Company, LP, Gibraltar Private Bank & Trust Company, RINET Company, LLC, Sand Hill Advisors, LLC, and Boston Private Value Investors, Inc.

History

Boston Private Financial Holdings, Inc. was founded in 1988.

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

Contents

RESEARCH METHODOLOGY

DISCLAIMER

1. BOSTON PRIVATE FINANCIAL HOLDINGS INC. COMPANY PROFILE

- 1.1. Key facts
- 1.2. Financial Performance
- 1.3. Key Executives
- 1.4. Ownership and Major Holders
- 1.5. Company History

2. BOSTON PRIVATE FINANCIAL HOLDINGS INC. BUSINESS OVERVIEW

- 2.1. Business Description
- 2.2. Major Products and Services
- 2.3. Markets and Sales Activities
- 2.4. Locations, Subsidiaries, Operating Units

3. BOSTON PRIVATE FINANCIAL HOLDINGS INC. SWOT ANALYSIS

- 3.1. Overview
- 3.2. Strengths
- 3.3. Weaknesses
- 3.4. Opportunities
- 3.5. Threats

4. BOSTON PRIVATE FINANCIAL HOLDINGS INC. FINANCIAL ANALYSIS

- 4.1. Financial Statements
 - 4.1.1. Income Statement
 - 4.1.2. Balance Sheet
 - 4.1.3. Cash Flow
- 4.2. Financial Ratios
 - 4.2.1. Profitability
 - 4.2.2. Margin Analysis

- 4.2.3. Asset Turnover
- 4.2.4. Credit Ratios
- 4.2.5. Long-Term Solvency
- 4.2.6. Growth Over Prior Year
- 4.2.7. Financial Ratios Charts
- 4.3. Stock Market Snapshot

5. BOSTON PRIVATE FINANCIAL HOLDINGS INC. COMPETITORS AND INDUSTRY ANALYSIS

- 5.1. Boston Private Financial Holdings Inc. Direct Competitors
- 5.2. Comparison of Boston Private Financial Holdings Inc. and Direct Competitors Financial Ratios
- 5.3. Comparison of Boston Private Financial Holdings Inc. and Direct Competitors Stock Charts
- 5.4. Boston Private Financial Holdings Inc. Industry Analysis
 - 5.4.1. Industry Snapshot
 - 5.4.2. Boston Private Financial Holdings Inc. Industry Position Analysis

6. BOSTON PRIVATE FINANCIAL HOLDINGS INC. NEWS & EVENTS

- 6.1. News & PR Activity Analysis
- 6.2. IR Corporate News
- 6.3. Marketing News
- 6.4. Corporate Events

7. BOSTON PRIVATE FINANCIAL HOLDINGS INC. EXPERTS REVIEW¹

- 7.1. Experts Consensus
- 7.2. Experts Revisions

8. BOSTON PRIVATE FINANCIAL HOLDINGS INC. ENHANCED SWOT ANALYSIS²

9. UNITED STATES PESTEL ANALYSIS²

- 9.1. Political Factors
- 9.2. Economic Factors
- 9.3. Social Factors
- 9.4. Technological Factors

9.5. Environmental Factors

9.6. Legal Factors

10. BOSTON PRIVATE FINANCIAL HOLDINGS INC. IFE, EFE, IE MATRICES²

10.1. Internal Factor Evaluation Matrix

10.2. External Factor Evaluation Matrix

10.3. Internal External Matrix

11. BOSTON PRIVATE FINANCIAL HOLDINGS INC. PORTER FIVE FORCES ANALYSIS²

12. BOSTON PRIVATE FINANCIAL HOLDINGS INC. VRIO ANALYSIS²

APPENDIX: RATIO DEFINITIONS

LIST OF FIGURES

Boston Private Financial Holdings Inc. Annual Revenues in Comparison with Cost of Goods Sold and Gross Profit

Profit Margin Chart

Operating Margin Chart

Return on Equity (ROE) Chart

Return on Assets (ROA) Chart

Debt to Equity Chart

Current Ratio Chart

Boston Private Financial Holdings Inc. 1-year Stock Charts

Boston Private Financial Holdings Inc. 5-year Stock Charts

Boston Private Financial Holdings Inc. vs. Main Indexes 1-year Stock Chart

Boston Private Financial Holdings Inc. vs. Direct Competitors 1-year Stock Charts

Boston Private Financial Holdings Inc. Article Density Chart

1 – Data availability depends on company's security policy.

2 – These sections are available only when you purchase a report with appropriate additional types of analyses.

The complete financial data is available for publicly traded companies.

List Of Tables

LIST OF TABLES

Boston Private Financial Holdings Inc. Key Facts
Profitability
Management Effectiveness
Income Statement Key Figures
Balance Sheet Key Figures
Cash Flow Statement Key Figures
Financial Performance Abbreviation Guide
Boston Private Financial Holdings Inc. Key Executives
Boston Private Financial Holdings Inc. Major Shareholders
Boston Private Financial Holdings Inc. History
Boston Private Financial Holdings Inc. Products
Revenues by Segment
Revenues by Region
Boston Private Financial Holdings Inc. Offices and Representations
Boston Private Financial Holdings Inc. SWOT Analysis
Yearly Income Statement Including Trends
Income Statement Latest 4 Quarters Including Trends
Yearly Balance Sheet Including Trends
Balance Sheet Latest 4 Quarters Including Trends
Yearly Cash Flow Including Trends
Cash Flow Latest 4 Quarters Including Trends
Boston Private Financial Holdings Inc. Profitability Ratios
Margin Analysis Ratios
Asset Turnover Ratios
Credit Ratios
Long-Term Solvency Ratios
Financial Ratios Growth Over Prior Year
Boston Private Financial Holdings Inc. Capital Market Snapshot
Boston Private Financial Holdings Inc. Direct Competitors Key Facts
Direct Competitors Profitability Ratios
Direct Competitors Margin Analysis Ratios
Direct Competitors Asset Turnover Ratios
Direct Competitors Credit Ratios
Direct Competitors Long-Term Solvency Ratios
Industry Statistics

Boston Private Financial Holdings Inc. Industry Position
Company vs. Industry Income Statement Analysis
Company vs. Industry Balance Sheet Analysis
Company vs. Industry Cash Flow Analysis
Company vs. Industry Ratios Comparison
Boston Private Financial Holdings Inc. Consensus Recommendations¹
Analyst Recommendation Summary¹
Price Target Summary¹
Experts Recommendation Trends¹
Revenue Estimates Analysis¹
Earnings Estimates Analysis¹
Historical Surprises¹
Revenue Estimates Trend¹
Earnings Estimates Trend¹
Revenue Revisions¹

ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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