



Investment Services

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Our investment platform was created to address the unique needs of wealthy families. Like institutions, wealthy families have the long-term capital to invest in traditional and alternative assets. Unlike institutions, wealthy families are constrained by taxes, legacy investments, restricted stock, and potentially other concentrated asset exposures. We built a platform that can meet the unique needs of all of our clients no matter their personal situation.

We customize investment management to each individual client. We recognize clients vary in risk tolerance, time horizon, liquidity needs, return objectives, and tax postures. Wealthy families can also have business interests, low-basis stock positions, or legacy managers they wish to retain. We work with each client individually to build portfolios that take all of these factors into account.

We offer a broad suite of traditional and non-traditional investments including fixed income, domestic and international equities, private equity, and hedge funds. Our management capabilities also extend beyond these asset classes to include family-specific assets like real estate, oil and gas, and closely held businesses.

Tax Efficiency

We think about tax in everything we do. From tax loss harvesting strategies to analyzing the optimal location for various assets (i.e., IRA, brokerage account, etc.), we constantly think about value creation for our clients. Low-basis assets are analyzed for use in philanthropy or estate planning. Hedge funds, notorious for generating short-term capital gains, are judged on an after-tax basis. When analyzing private equity investments, we prefer value realization taxed at long-term capital gains rather than ordinary income.

Diversification

We analyze, evaluate, and pursue diversification across asset classes, securities, and managers. Our investment advisors tailor portfolios to meet the needs of each individual family and consider liquidity, time horizon, and income as well as their capacity to tolerate risk.

Access and Scale

We have access to institutional-quality investment managers. By pooling client capital and creating leverage in the market, we have the opportunity to take advantage of investments that may otherwise be closed to new or individual investors.

Implementation and Monitoring

We build each portfolio in anticipation of achieving specific risk and return objectives for our clients. We do this by leveraging our data and analytics resources to track and evaluate investments in our client's portfolios. The metrics we employ provide us with important insights and feedback that we use to implement changes if necessary or to confirm our current positions.

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