

## The Value of a Portfolio Management team for Financial Advisors

### **A** Access to specialized knowledge and experience.

1. Leverage the expertise of a seasoned portfolio manager with a deep understanding of markets
2. Benefit from insights gained through years of managing diverse portfolios

### **B** Opportunity to capitalize on uncommon ideas.

1. Embrace innovative and unconventional strategies to outperform the market
2. Stand out from competitors by offering unique investment approaches

### **C** Collaboration and partnership

1. Foster a mutually beneficial relationship with financial advisors
2. Work together to achieve shared goals and enhance overall portfolio performance

### **Utilizing a team to help with portfolio management, you gain access to in-depth knowledge of:**

- Truly customized investment strategies, asset allocation, risk management, and market analysis. Our offerings provide valuable insights and guidance to financial advisors, enhancing the quality of their portfolio management decisions.

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## Allocation Strategies

### Strategic Asset Allocation (SAA)

- Passive investment approach
- Required limited monitoring.
- Rebalancing Quarterly, Semi-annually, or annually.

### Tactical Asset Allocation (TAA):

- Flexible Approach.
- The goal is to add Alpha (additional active return).
- Can be used to enhance Strategic Asset Allocation.
- Diversification without foregoing potential returns.

### Core-Satellite Asset Allocation.

- Combines passive and active portfolio management.
- The goal is to outperform a benchmark.
- Beneficial for investors seeking to diversify using indexing while layering sub-portfolios for a potentially higher return.

### Alternative Asset Class Exposure:

- Helps reduce volatility in times of market uncertainty.
- Structured Products.
- Managed Futures.
- Long-Short Portfolios.
- Merger – Arbitrage Strategies.
- Hedge Fund Replication Products.
- Market Neutral Strategies.

In summary, we aim to help customized portfolio solutions, leveraging uncommon ideas, and offering expertise in investment research and risk management. By collaborating with financial advisors, you can deliver tailored strategies, access specialized knowledge, and support the achievement of shared goals. Embracing innovative ideas and showcasing your ability to drive superior returns will set you apart as a trusted partner in portfolio management.

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