

Invest Like the Super Rich



The Retirement Pros



™

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Invest Like the Super-Rich

The wealthy have access to pleasures and opportunities most people can only dream of: mansions, private jets, exclusive clubs, and more. Investing through separately managed accounts used to be part of this exclusive list.



But recent technological innovations allow us to provide professionally managed separate accounts to most of the investing public.

Smart, successful, savvy investors maximize the risk-adjusted returns of their portfolios by globally diversifying, keeping costs low, and minimizing taxes. Until now, most investors were unable to accomplish all three simultaneously. But now, investors are getting all three by upgrading with us.

Shouldn't you?

Investors' Benefits Include



Access to multiple money managers

You access exclusive institutional style managers who are experts in each asset class and/or equity style.

A custom asset allocation

Modern portfolio theory and recent empirical evidence influence our portfolio engineering process.

Direct ownership of equities

You don't have to be part of a commingled mutual fund.

Transparency regarding your investments

See the up-to-date picture of the actual stocks you own, not just the mutual funds you own.

Not paying others' income taxes

Mutual funds can cause you to pay taxes even when you don't have a profit.

Not paying others' capital gains taxes

Control your cost basis. In a mutual fund, your cost basis may be affected by the decisions of other investors.

Saving taxes through tax lot harvesting

You can match gains and losses to minimize taxes and maximize growth.

Truly wealthy people typically do not invest in mutual funds. Their accounts have been separately managed for decades. Don't you deserve the same benefits?

Join the revolution!
Welcome to a better investment solution!



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