

# INVESTMENT PROCESS

#### UNIVERSE

Start with thousands of liquid, transparent investment strategies. Mutual funds, ETFs, Private Accounts, CEFs, UITs

### MONITORING & RE-EVALUATION

#### PERFORMANCE

Filter for strategies that repeatedly show outstanding performance compared to peers and benchmark

### COST & OPERATIONS

Final determining factors will include the investment cost, accessibility of portfolio managers, tax-friendliness, and ease of integration into a client's portfolio

### P

PHILOSOPHY

Of the strategies that seem to have a superior balance of risk and performance, study their philosophy and process to determine if their success is understandable and repeatable

## RISK

Test the filtered funds for volatility, negative performance, consistency, portfolio diversification, and correlation to other funds

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