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## **Portfolio Analysis and Construction**

We employ a proprietary model of generating the consistent views of North America's top institutional investors. We use these views to construct model portfolios that have a history of significant risk adjusted out-performance vs. our respective peers and benchmarks. We employ a meticulous approach to selecting superior institutional investments and balancing asset allocation, manager selection, macro and micro styles to each client's specific needs. Taxation and Fees of our portfolios is also of significant importance.

We would love to take you through our process and discuss our model portfolios in person.