

EXCELSIOR WEALTH MODELS

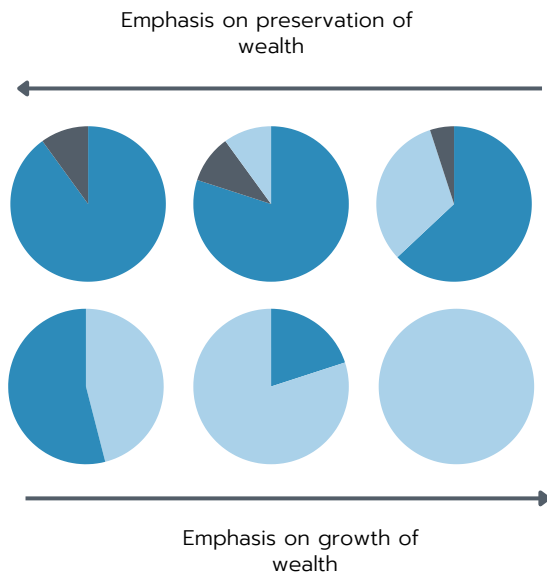
Unique Investment Philosophy

Our investment philosophy is deeply rooted in distinguished academic research, drawing from Nobel Prize-winning insights in economics and finance. We adopt a strategic approach to asset allocation, merging traditional methods with innovative strategies to navigate diverse market conditions. Guided by our core objectives, we are dedicated to optimizing returns, efficiently managing risk, and minimizing costs, ensuring a balanced and thoughtful approach to wealth management.

➔ Asset allocation models designed to meet your objectives and risk capacity.

➔ Diversified exposure to innovative and specialized markets.

Model Portfolios



- Equities
- Fixed Income
- Alternative Investments

Alternative Investments

Alternative investments, distinct from traditional stocks and bonds, often have low or negative correlation with these assets, reducing portfolio volatility and enhancing risk-adjusted returns.

Smart ETFs

Smart ETFs blend active and passive management styles, adopting a specific criteria for stock selection, a contrast to traditional ETFs that typically mirror benchmarks like the S&P 500. This strategy aims to potentially surpass the performance of standard market indices.

Customization*

Customize your portfolio to ensure alignment with your unique preferences. This can include socially responsible funds, prioritizing ethical and sustainable practices, or individual securities aligned to your values.

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*Available to clients in the Custom Plan

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