



INSTIVIDUALS™

As an investor with substantial assets looking to manage your wealth as effectively as possible, it's best to start by considering the ancient Greek maxim commonly credited to Socrates: "Know thyself."

Because of your substantial portfolio, your own profile is virtually institutional in terms of the quality of asset management you require. Indeed, the largest institutions and the wealthiest individuals and families share a number of important investor characteristics, including:

Fiduciary Duties.

Institutions, as well as trustees and guardians of family wealth, are held to a significantly higher standard of responsibility when it comes to asset management because both groups are often legally obligated to make prudent financial decisions on behalf of all the beneficiaries they serve. For wealthy families, meeting these obligations can prove especially challenging.

Control.

Systems to maintain a high degree of due diligence must be designed and integrated into the investment program. These systems must ensure that the investments and financial professionals used are consistently working to meet the institution's or the individual's specific goals.

Multigenerational Needs.

The legacy capital that wealthy families invest often must provide for today's beneficiaries (including family members and charitable organizations) as well as endure for multiple future generations, just as endowments and foundations must manage to meet current and future liabilities. Both groups therefore face the challenge of incorporating a disciplined investment process.

Global Opportunity Set.

Institutions and wealthy private investors view the entire global set of available investment solutions, those within the U.S. and other developed economies, as well as those in emerging markets, and even frontier regions.

Sophisticated Investment Requirements.

Institutions and wealthy private investors have access to a myriad of advanced investment solutions that are simply not available to, or practical for, retail investors with smaller sums. These solutions, combined with traditional strategies, create highly customized portfolios that enable ultra-affluent investors to tailor their investment portfolios to their specific objectives.

Superior Manager Requirements.

When taking responsibility for many millions of dollars in assets, the needs for disciplined investment managers with superior capabilities becomes paramount. Many affluent investors have complex concerns regarding tax sensitivity, concentrated stock positions and illiquid assets (such as family-owned businesses) that demand a level of management experience not found among those firms serving more traditional investors.

Institutional-quality investors require a solution built from the ground up and designed specifically to meet their unique profile and needs. Investors with significant assets must recognize that their financial position requires them to be treated like the world's largest institutions.

Our Approach

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Contact

- info@lwfflynn.com
- 1-800-954-2506

Comprehensive View of Risk.

Institutions and wealthy private investors require a more holistic view of risk, one that examines factors such as capital control, transparency, concentration, leverage, and operational risks when considering making an individual investment within the context of the overall portfolio.

