

Strategy Overview



CIO Strategies is our discretionary solution for multi asset investors

CIO Strategies is an open architecture, broadly diversified discretionary portfolio solution which seeks to meet or exceed a client's return objectives while staying within their stated risk parameters.

- Investment allocations in each of the four strategies are actively managed to take advantage of tactical opportunities in different asset classes while maintaining that strategy's risk/return requirements.
- Currently utilizes three asset classes and 14 sub-asset classes; U.S. large cap equity and U.S. investment grade bonds may be separately managed by proprietary asset class specialists.
- Sub-asset classes are implemented through top-quartile proprietary and third-party mutual funds and ETFs.