



# EXCELSIOR WEALTH INVESTMENT PROCESS

**EXCELSIOR WEALTH IS A RISK  
BASED INVESTMENT ADVISORY  
FIRM THAT FOCUSES ON  
ALLOCATION BASED VOLATILITY  
MANAGEMENT.**


**OUR INVESTMENT COMMITTEE  
FINALIZES OUR VARIOUS INVESTING  
DECISIONS AS WE HAVE FOUND  
THAT OUR COLLECTIVE TEAM  
UNDERSTANDING IS GREATER THAN  
THAT OF ANY INDIVIDUAL.**



- OUR COLLECTIVE TEAM ENGAGES IN WEEKLY MEETINGS AS WELL AS QUARTERLY FULL DAY SESSIONS THAT ARE FOCUSED ON IDEA GENERATION AND INVESTMENT OPPORTUNITIES THAT ARE GREATLY DEBATED.
- STARTING WITH GLOBAL-MACRO ECONOMIC TRENDS AND THEN FINE-TUNING SECTOR OPPORTUNITIES INTO A GRANULAR LEVEL WHILE EVALUATING SECURITIES
- WE USE VARIOUS ANALYST RESEARCH, SOFTWARE, AND PUBLICATIONS IN OUR INVESTMENT PROCESS THAT CONCENTRATES ON BUILDING PORTFOLIO CONSTRUCTION WHILE PARTNERING WITH VARIOUS RESEARCH FIRMS IN THE BUILDING OF OUR PORTFOLIOS.
- WE USE MANY TOP INVESTMENT PARTNERS FOR IDEA GENERATION, PEER TRENDS, AND SECOND OPINION ANALYSIS.
- WE ARE FOCUSED ON MINIMIZING EXPENSES AND TAXES IN OUR PORTFOLIOS.
- EXCELSIOR WEALTH IS LOOKING FOR THREE KEY ATTRIBUTES IN STOCK SELECTION : COMPANIES WITH STRONG GROWTH CHARACTERISTICS, A HIGH DEGREE OF EARNINGS MOMENTUM, AND A REASONABLE VALUATION.
- WE CONSTANTLY FOLLOW THE WORK OF TOP HEDGE FUNDS, MONEY MANAGERS, AS WELL AS ETF INFLOW/OUTFLOW AS WE SCREEN THE INFORMATION FLOWING THROUGH TODAY'S FINANCIAL MARKETS.
- IDEAS ARE GENERATED FROM A BLEND OF FUNDAMENTAL AND SYSTEMATIC RESEARCH. IDEAS ARE BOTH QUALITATIVE AND QUANTITATIVE.
- WHEN WE MISS ON AN INVESTMENT, WE AIM TO MISS SMALL. WHEN WE HIT ON AN INVESTMENT, WE WORK TO WIN BIGGER.
- WE USE ALTERNATIVES INVESTMENTS AND ARE FOCUSED ON PRIVATE EQUITY OPPORTUNITIES.



RETIREMENT STRATEGIES | INVESTMENT MANAGEMENT | FINANCIAL PLANNING



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