

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.



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