



For decades, individuals and families of distinctive wealth have trusted the Eideard Group to provide its full-spectrum of family office and wealth management services to preserve and grow their financial assets.



INDEPENDENCE MEANS...?

At Eideard, independence means just that. We are not beholden to any investment manager with whom we have engaged. Our focus is simply on serving as your fiduciary and striving to excel in all matters investment related. Our investment research is focused on identifying and engaging boutique investment managers across the spectrum of asset classes to form a “go to” stable of best of breed investment opportunities.

DID YOU KNOW?

People are often surprised to learn that, at any given time, we work with a universe of 15-20 different investment managers.

Identifying the most appropriate investment portfolio involves a careful process of due diligence and the matching of investment characteristics with client expectations. The ideal portfolio and the most appropriate manager(s) who comprise it will vary from client to client and will be determined by the individual objectives of each.

At the outset of any client relationship, a core mission is to assist our clients in this selection process to identify the most appropriate combination of investments from a stable of qualified managers on whom Eideard has conducted this vetting process.

Performance is then measured and evaluated on an ongoing basis...

Qualitatively, each manager must demonstrate long-term organizational stability, a distinct investment philosophy, an exceptional culture, a common alignment with clients as well client friendliness and responsiveness.

Quantitatively, each must possess an “identifiable and repeatable” investment process; one whose proof resides in top quartile long-term “risk adjusted” investment returns. We seek to engage managers who our focused-on preservation of capital through downside risk protection but who will also competitively participate in upside market capture. Further the manager must embrace tax efficiency. This combination of attributes presents a high bar for many managers wishing to gain access to our qualified universe.

Despite our intense search and selection methodology, experience tells us that no manager can guarantee “all season” performance. While market technicals, headline news and prognostications typically drive short term returns, performance over a longer horizon is embedded in the notion of the “repeatable process”. That said, there are often a host of peripheral dynamics that may affect a manager’s performance, some obvious and others more subtle. Whichever they are, most involve human capital and will typically include turnover in key personnel, changes in compensation, issues related to business succession planning, a change in investment thesis or simply losing one’s confidence in a difficult market environment.

Accordingly, following the portfolio construction process, Eideard’s role only intensifies so as to ensure our clients’ expectations are not compromised. Disciplined and acute periodic monitoring must occur and if over any reasonable period a manager falls short of expectations on any front, they are promptly relieved.