

# A Business Approach To Investing

*We are Registered Investment Advisers offering wealth management and asset management services for families, individuals and institutions.*

*We offer experienced leadership, independent thought and highly customized investment solutions. Our investment process is client centric and based on our firm belief in a value oriented style of investing.*

## Invest For The Long Run

We take a business approach to investing. When investing for our clients and ourselves, we think and act like business owners who intelligently allocate their capital in order to generate attractive long term investment returns. We don't just buy and sell stocks and bonds. When investing in stocks we think of it as buying an ownership in a business. Similarly, we buy bonds like we would provide somebody a loan. We do this always with an eye to protect our client's capital by avoiding permanent capital losses which is what we understand as the real risk to investors. As such we focus on the price paid and embrace volatility as it provides us with an opportunity to take advantage of market inefficiencies. This business approach to managing assets provides our clients with a more intuitive and long term investment perspective.

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Mary Mori-Huston is a co-founder and managing partner at Mori Huston Partners LLC.

Mrs. Mori-Huston has more than 24 years of experience in banking and in the investment advisory business. She started her career with Bankers Trust Company (now Deutsche Bank) as a Relationship Manager for the Latin American region. After 10 years with that institution she joined Lehman Brothers, where she was a Financial Consultant. In 1998 she joined Dresdner Bank in the position of Investment Consultant, and was a voting member of the Global Investment Strategy Team. In the year 2005 she moved with UBS to Zurich, Switzerland and assumed the position of Senior Client Advisor.

Mary graduated from Florida International University with a dual major in International Business and Finance and with a degree in International Bank Management.



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Robert Mori is a co-founder and managing partner at Mori Huston Partners LLC.

In 1998 Robert joined the Allianz/ Dresdner Group where he worked as an investment advisor and corporate fixed income analyst in their Hamburg, Bogotá and Miami offices, before advancing to become the Head of Product Development and Quantitative Asset Allocation for Allianz/Dresdner Private Banking The Americas. In 2005, Robert moved to Europe to become the Global Head of Structured Products for Dresdner Bank's private and corporate client business. In 2008 he became the Head of Investment Products and Investment Advisory Services for Dresdner Bank Switzerland. In addition, he was a member of the Global Investment Policy Committee for Dresdner Bank Group.

Robert graduated from the Vienna University of Economics and Business with an advanced degree in International Business Administration. He also holds the Chartered Financial Analyst (CFA) and the Chartered Alternative Investment Analyst (CAIA) designations.



**MARIA ELENA HERNANDEZ**  
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Mrs Hernandez has more than 25 years of experience in banking and wealth management services. She started her career with Panamerican Bank (today Bank of America). She has been at Bankers Trust Co. (today Deutsche Bank) for 13 years as Service Executive/Account Manager for the Latin America market. Mrs. Hernandez has also been at Citibank International as a Relationship Officer for the Chilean market and recently at SunTrust Bank as Client Advisor for international and US clients.

## Sounding Board

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Uwe Seefeldt is a co-founder and managing partner at Mori Huston Seefeldt + Partner GmbH.

He has more than 30 years of in-depth experience in the international private banking business with a strong focus on Latin America. From 1987 until 2005 he worked with Allianz/Dresdner group in their Hamburg, Mexico-City and Miami offices while holding positions as Senior Relationship Manager, Team Leader, Country Head and Regional Marketing Manager for Mexico. Uwe moves to UBS's head office in Zurich in 2005 after UBS acquired the Latin American Private Banking Business of the Allianz/Dresdner Group. In 2007 he joined the senior management team at Credit Suisse Mexico International as Team Leader and Senior Client Advisor. In 2015 he co-founded Mori Huston Seefeldt + Partner GmbH, Zurich.