



TIMELESS VALUES

DISPASSIONATE &
RIGOROUS ANALYSIS

RELENTLESS INNOVATION

Integra Global Advisors LLC is an investment advisory firm serving ultra-high net worth families and charitable institutions. Our clients entrust us to serve as stewards of multi-generational family legacies and institutional missions, along with being tasked to structure and implement investment portfolios in line with their investment objectives. An awareness of this dual privilege and responsibility motivates our ongoing commitment to excellence in idea generation and efforts in seeking to deliver value to our client relationships.

In our view, success in navigating a fluid and ever changing investment landscape as well as exceeding client goals is the result of adhering to a set of core beliefs that serve as guiding principles for our firm:

True partnership with our clients is achieved through a fundamental alignment of interests and the removal or mitigation of potential sources of conflict. We believe that this helps ensure objectivity of advice at all times and privileges client interests above all else.

If we are to take seriously our role as trusted advisor, it is imperative that we focus on solving our clients' most urgent problems, even when they do not directly relate to investment management concerns.

We believe that genuine insight is the product of rigorous analysis and original research, informed by professional experience and tempered by a dispassionate questioning of accepted investment dogma.

In our view, risk management and capital preservation broadly understood are reflexes that must override other investment considerations at all times.

Our clients have a right to expect continuous innovation from us, whether in identifying new sources of investment opportunity, risk diversification, cost reduction or implementing strategies that seek to improve an investment's tax efficiency.

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