Building and preserving wealth requires a skilled approach to capturing value underscored by discipline, independent thinking and prudent judgment.

At UAS Asset Management, we have applied this philosophy to our investment and wealth management business for over 25 years. In serving the needs of individuals, families and institutional investors, our professionals are keenly focused on investing in global businesses with superior economics, proven management, and strong brand value – we believe those characteristics lead to enduring advantage.

We build portfolios of significant publicly traded global companies whose range of businesses provides inherent diversification and whose scale and tenure demonstrate durable competitive advantage. We invest when we believe prices are reasonable and maintain positions only when all advantages remain in place. Our high conviction results in relatively concentrated portfolios.

OUR FIRM

Our investors appreciate access to our investment team and take comfort from regular dialogue with the team entrusted with their assets.

UAS Asset Management has been entrusted to manage individual and institutional portfolios since 1987. The firm has followed the same investment philosophy for over twenty-five years. We consistently apply thorough fundamental research with dispassionate analytics, independent thinking, and discipline, while continuously learning and adapting.

As investment managers, we take responsibility for our clients' assets as fiduciaries, always placing their interests first. We keep our team small and focused on core competencies and choosing to partner with world-class providers for all support functions. We work only with independent qualified custodians for the safekeeping of our clients' assets.

Our Executive Team

Bahman Mossavar-Rahmani

Bahman Mossavar-Rahmani

Bahman is a founding member of UAS Asset Management and serves as its Chief Investment Officer and Senior Portfolio Manager. He has been chiefly responsible for development and execution of UAS investment philosophy and approach.

Prior to organizing UAS, Bahman was a founding member of Connecticut Securities, a Hartford firm specializing in fixed-income investments. He has started, acquired or advised companies in the securities, consumer information, distribution, and business equipment industries. Bahman started his career as a financial journalist, prior to roles in commercial banking and fixed income securities.

Bahman attended Harvard College and the Harvard Graduate School of Business Administration. Bahman and his wife reside in Greenwich, CT.

Ali Granmayeh

James J. Lisanti

Richard Goldstein

OUR APPROACH

We approach investing from the perspective that preserving wealth is essential to building it.

Our assessment of a company's prospects and value relies on a variety of both quantitative and qualitative factors. We look for great companies whose business model we can understand and whose future earnings we believe we can reasonably estimate. Our high conviction results in concentrated portfolios of distinctive companies whose brand value, diversified holdings, proven management and strong financial profile set them apart as leaders.

Importantly, we balance our fundamental analyses with a view toward long-term global trends and secular themes, seeking companies where we believe demand for their products and services is likely to grow based on positive demographic trends and increasing economic development.

Risk management goes hand-in-hand with portfolio construction. Conventional wisdom equates risk with monthly, or even daily, volatility of prices of securities. We, on the other hand, regard risk as the likelihood of permanent loss of capital. Viewed in that light, we are focused on inherent value of our holdings not on the daily fluctuations of their prices. By investing only in publicly traded securities we further manage risk by maintaining highly liquid portfolios.

Consistent application of our investment philosophy enables clients to properly evaluate the efficacy of our investment strategy to achieve their objectives.

OUR PHILOSOPHY

Prudent investing centers on preserving and growing wealth for generations, as such we invest in

The philosophy governing our approach to investing is straightforward: we want to own superior companies with good management at reasonable prices and remain owners as long as all three criteria are met. As such, our research is aimed at defining and assessing each of these aspects: what are superior economics, reasonable prices and good management and which companies possess them.

companies who think likewise.

While our philosophy is simple and understandable, successful implementation is anything but. Not only does it require dispassionate analysis and research in assessing each potential investment, but, and perhaps more importantly, it requires patience, discipline and courage.

We are proud of the quality of our research and analysis, but we believe that the real differentiator for UAS lies in our independent thinking and discipline in acting on well-reasoned convictions — going against the prevailing trend, takes a particular temperament and courage, honed by a disciplined process.

OUR OFFERING

Our primary service is management of equity portfolios in separately managed accounts (SMAs) for individuals, groups and institutions. In addition, we manage balanced accounts for clients who need current income by investing an appropriate portion of the portfolio in US Government bonds and investment grade corporate bonds.

We manage a variety of retirement accounts, including IRAs, 401(k)s and pension plans. In addition, we accept accounts for trusts, foundations, endowments, corporations, associations, and other pools of capital. In all cases, we coordinate our efforts with accountants, pension administrators, legal advisers, and other professionals assisting our clients.

For qualified investors, UAS offers an alternative investment vehicle with a performance-based fee structure.

OUR CLIENT FOCUS

Our clients are our business. We strive to build enduring relationships by understanding our clients' needs and objectives, ensuring our clients know what they can expect from our team.

We begin every client engagement with an open and honest dialogue designed to accomplish two goals:

1. To gain an understanding of what the client's needs and objectives are.
2. For the client to have a clear understanding of how we approach investing and the stewardship of their assets. We only embark on a new relationship when our approach and strategies are aligned with and can be effective in meeting our client's financial goals.

CONTACT US

For further information, please contact Richard Goldstein directly or fill out the form.

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Comments / Questions

Please type the characters *

SUBMIT