

The Value of Independence

We created a model that is independent, aligned with our clients' interests, and fully transparent, helping to resolve the typical conflicts which arise with traditional wealth advisory services.

Our Services

We have a very “hands-on” approach at BigSur. Clients are encouraged to be as involved as they would like in our process. Clients can attend board and committee meetings, gain access to our research, join our diligence meetings and visit our product portfolio.

Investment Advisory

From discretionary to consulting, reporting or consolidation, BigSur offers a wide array of advisory programs tailored to meet any client need. We provide a holistic, total balance sheet approach that encompasses all of our clients’

assets, both tangible and intangible. Our investment process combines both a top-down and bottom-up approach: we think “macro” and invest “micro.”

Our investment philosophy is built upon finding intrinsic value across global markets and asset classes. BigSur manages “stay-rich money” not “get-rich money”, therefore capital preservation and future generational wealth are always at the forefront of our decision-making. We pride ourselves in being extremely detail-oriented, both in our due diligence processes and in the transparency we provide for clients.

While our philosophy is timeless, its implementation is constantly evolving. We are always staying ahead of the curve, adopting quantitative and analytical models, technologies and software tools to our approach. We believe this is key to be constantly elevating the quality and level of service we provide to our clients.

Private Investment Platform

BigSur has invested in over 45 alternative investment managers and direct co-investments across the United States, Europe and Asia. Our investments span numerous strategies within the

real estate, private equity, private debt and venture capital asset classes.

In some instances, these investments are not available on banking platforms, are often oversubscribed, and require years of relationship building in order to gain access to.

BigSur's private investment platform seeks top-quartile managers exhibiting consistent performance relative to their peers over multiple market cycles. We focus on those that have meaningful investments in their own products to ensure an alignment of interests, and those held by the leading institutional investors, sovereign wealth funds and family offices around the world.

We are deeply focused in looking at the incentive systems in any business we do – in this sense we always want “skin in the game”.

Institutional Custody and Execution

Our platform allows us to achieve efficient portfolio management through superior implementation of investment ideas and oversight of fewer securities.

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Clients have a broad access to global markets with an institutional pricing and no additional transaction mark-ups, they benefit from substantially lower fees, commissions and expense ratios than those provided by private banks.

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These cost savings are entirely for our clients, fully transparent and available on a transaction-by-transaction basis.

Other Services

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BigSur coordinates activities with trusted service providers on behalf of our clients. Clients only deal with us as we take care of everything on their behalf. Services providers include: lawyers, accountants, tax advisors, art advisors, philanthropy advisors, family governance coaches & mediators.

BigSur can help clients with the management and reporting of their tangible

assets. We also assist clients with more personal requests given the level of trust they have placed in us. Most clients see us as an extended member of their families.