

A global approach to investment management



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Welcome to Oak Grove

We are confident you will find that the Oak Grove approach and model is simply different from what you may be accustomed to. The Oak Grove mission, vision, and values reflect our convictions—about how we would want our money to be managed—that were forged by over thirty years of experience in finance, law, and international management.

Our management approach includes:

- **Direct Communication:** Understanding and advancing each of our select investors' interests responsibly.
- **Managed Risk:** Applied strategic and tactical asset allocation at a global level. Emphasis on portfolio risk management (over “performance chasing”).
- **Transparent Costs:** Transparency with performance interests fully aligned with our clients.
- **Direct Access:** On-line investor account access 24 hours a day, 7 days a week.

- **Coordination:** Oak Grove works seamlessly with other professional resources (i.e. legal, tax, etc.) as requested.

Our approach is different—but, it shouldn't be. We strive to deliver what we should all expect: experience; access to high-quality, cost-effective financial products; responsive communication with investment professionals, not sales staff; transparency; and accountability in serving our clients.

Oak Grove Values

- **Integrity:** Being transparent and accountable in all aspects of serving our clients and earning their trust, leading by example in our marketplace, and following through on our word.
- **Stewardship:** Managing our clients' financial interests for them as if they were our own; according to their preferences, goals, and needs.
- **Excellence:** Challenging ourselves to constantly improve investment performance and client communication.

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