



Copper River is an independent Registered Investment Advisory Firm (RIA).

The firm provides institutional portfolio management and investment consulting services to Fortune 500 companies, as well as custom portfolio construction for select individual investors and their families.

The partners at Copper River have over 40 years of experience in the financial markets. We have held senior level positions in portfolio management, credit and risk analysis as well as institutional fixed income sales and trading.

PORTFOLIO CONSTRUCTION AND INVESTMENT ADVICE

Our focus is portfolio construction and providing investment advice to both institutional clients and high net worth investors. With a singular focus, we eliminate outside noise and concentrate on managing our clients' assets by utilizing the most suitable investment products. Our typical client is:

A Corporation or institutional client with over 50 million that requires detailed fixed income analysis and investment advice related to treasury, agency and corporate bond portfolios. We have worked with Fortune 500 corporations over the past fifteen years and have extensive knowledge of the investments that are most suitable for corporate treasurers and pension funds. With the constantly changing regulatory and interest rate environment we have become a trusted, non-biased resource in the institutional space.

An Individual Investor with over a million dollars of investable assets. Our clients have the need to consolidate their investment accounts into a single comprehensive solution and have the desire to work with an independent advisory firm that operates as a fiduciary. As investment advisors, we use our experience to evaluate holdings across all asset classes including equity, fixed income, commodities and alternatives (physical assets, private placements and angel investing).

FIDUCIARY

Being a fiduciary means we are legally obligated to work for your benefit. By doing so, we place your interest ahead of anyone else's, including our own. We hold ourselves to the highest standard when evaluating your investments.

EXPERIENCE

Our experience is key to who we are and how we approach portfolio construction and proper risk management for our clients. Our extensive backgrounds and history in working in the markets is unique amongst RIA firms, and is the main reason our clients decide to work with us.

SERVICE AND COMMUNICATION

As an independent firm, we choose to work with only a select set of clients. What this means is that we will work directly with each client, understand their personal goals and know each of their positions. As a firm we are always available for our clients.
