



MONOGRAPH

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A Monograph is known throughout academia as a highly detailed and thoroughly documented summary of a distinct subject. Our clients' Monograph illuminates pertinent information and allows them to fully grasp tradeoffs and make well-informed decisions. Clients' involvement in this process is efficient, effective and rewarding, providing peace of mind.



We continually evolve a comprehensive review of empirical research, published journals, white papers and other analyses that seek to identify more confident sources of returns and/or more compelling portfolio methods.



For each client family, we construct a Financial Monograph, a personalized and highly tailored wealth plan. Our proprietary system is a liability-based method of asset allocation, which is driven by client-defined priorities. Our planning method results in a portfolio that accesses more confident sources of return using low expense, engineered public market investment vehicles.

We assist clients in defining their priorities and then organize them into a framework that further identifies them as essential, important or aspirational. While intuitive to the client, these terms also serve as proxies for understanding the suitability of risk for each objective. This process details a client's life objectives and defines the priority, risk suitability, character and liquidity requirements for each objective.

We are then able to calculate the capital necessary to fund the full set of priorities and review the sufficiency of available financial resources, both current and anticipated future resources (e.g. unrealized human capital, inheritance). Suitable return factors are then systematically matched to fund or protect each objective.

Ultimately, the portfolio behaves like a privately tailored hedge minimizing the volatility around the achievement of the client's priorities. Traditional methods of investment strictly seek to minimize asset volatility without regard to the objectives the assets are intended to support. At Monograph, portfolios are tailored, suitable and fully transparent to clients. Clients ultimately understand the purpose of each asset in the portfolio, providing perspective that enhances their ability to consider various tradeoffs. We believe that clients will make better decisions when empowered with more information in an unbiased format.



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# Monograph Wealth

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