



MAXIMAI

INVESTMENT PARTNERS

TRUST.

INTEGRITY.

EXCELLENCE.

The name MAXIMAI illustrates the blend of the service we provide and the clients we serve. Derived from the plural form of the word “maximum,” we offer *maxima* service and capability for the most discerning global clients.





COMPANY OVERVIEW

MAXIMAI Investment Partners is a boutique investment advisory firm located in Miami, Florida. We provide comprehensive financial planning, overall wealth management and strategic investment advice to ultra-high-net-worth individuals, entrepreneurs, and families.

The principals of MAXIMAI came together more than 20 years ago. In 2016, they broke away from the traditional broker model to form MAXIMAI Investment Partners, an independent firm that operates within an open-architecture environment to deliver high-caliber solutions and unbiased intelligent advice.

Our firm caters to a small group of distinctive clients, allowing us the time needed to customize services and solutions carefully. Our extensive network of independent professionals and specialists enables MAXIMAI to offer concierge service to those with international financial interests with *excellence, integrity and trust*.



WEALTH MANAGEMENT AND ADVISORY

MAXIMAL serves ultra-affluent global clients with a focus on Latin America and the Caribbean. Our capabilities include wealth management, domestic and international estate and trust planning, family office services and, through an extensive network, access to specialized banking services, attorneys, tax and other professionals who can guide clients through the intricacies of working worldwide.

Dedicated to wealth preservation, we develop customized portfolios that address each client's specific investment goals using a well-developed set of core and tactical investment models. Our strategy team executes market analysis, manager selection and performance monitoring.



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