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ABOUT

Atlas Capital Advisors is an independent, S.E.C. registered investment advisor based in San Francisco. We provide customized investment solutions that deliver performance at a reasonable price. Our systematic investment approach is grounded in academic and proprietary research. We emphasize strong risk management and capital preservation. Our clients compensate us on a fee-only basis.

WHY ATLAS?

- Jono Tunney, Founder and Managing Partner

"Atlas was founded to provide investors with better than index performance by focusing on empirical evidence of what actually drives persistent returns. We have achieved this goal while eliminating the need for financial intermediaries who bloat costs and adversely impact returns."

~~We are quantitative money managers who value~~

Systematic Approach

We are disciplined unemotional

Transparency

We show you how, why and what investments

Liquidity

We invest only in publicly traded securities

Diversification

We typically hold a smaller subset of the

Customization

We help clients express their social values and

OUR INVESTMENT PHILOSOPHY



Evidence Based Methodology Loading: 100% **100%**

At Atlas Capital Advisors, we've formulated our equity investment thinking over a number of years, drawing heavily from personal experience and leading academic research. Successful investing requires a long term perspective. Too frequently the investing community can focus on near term results or the latest fad , neither of

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[Read More \(https://www.atlasca.com/evidence-based-methodology/\)](https://www.atlasca.com/evidence-based-methodology/)

Keep Fees Low

Atlas operates as a registered investment advisor and fees are charged on invested assets without the return-sharing typical of hedge funds or the layering of costs typical of fund of funds, investment brokerage firms and insurance companies. There have been numerous academic studies quantifying how the layering of fees adversely affects client ...

[Read More \(https://www.atlasca.com/keep-fees-low/\)](https://www.atlasca.com/keep-fees-low/)

Transaction Costs Matter

Transaction costs can have a large impact of portfolio performance. Our proprietary software incorporates all three levels of the transactional cost pyramid when making our trading decisions. Most people tend to focus on commissions when they think about transaction cost, but commissions turn out to have a small overall impact

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[Read More \(https://www.atlasca.com/transaction-costs-matter/\)](https://www.atlasca.com/transaction-costs-matter/)

HOW IS ATLAS DIFFERENT

- ✓ WE BELIEVE THAT ASSET ALLOCATION IS THE PRIMARY DRIVER OF RETURNS
- ✓ WE BELIEVE THAT THROUGH ACADEMICALLY TESTED FACTORS, OUR CLIENT PORTFOLIOS CAN PERFORM SLIGHTLY BETTER THAN THE MARKET
- ✓ WE BELIEVE A FINANCIAL ADVISOR SHOULD NOT GET PAID BASED ON WHAT PRODUCTS THEIR CLIENTS USE
- ✓ WE BELIEVE MOST OF WHAT IS SOLD IN THE INDUSTRY IS NOT NECESSARILY IN THE BEST INTEREST OF THE CLIENT
- ✓ WE ARE A FIDUCIARY TO OUR CLIENTS – PLACING CLIENT’S INTERESTS AHEAD OF OUR OWN
- ✓ WE INVEST OUR OWN ASSETS IN THE SAME STRATEGIES THAT WE INVEST OUR CLIENT ASSETS

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OPERATING SINCE

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SERVICES

Our objective is to help clients meet their financial goals with thoughtful planning and investing strategies

FINANCIAL PLANNING

Any sound individual financial strategy requires client discussion before developing an implementation plan. Together, we create your unique Investment Policy Statement after a full understanding of your risk tolerances, investment objectives, aggregate wealth and income, as well as current risks to your goals.

ASSET ALLOCATION

The Atlas asset allocation approach is based on techniques developed by some of the country's largest and most sophisticated institutional investors. Atlas uses this experience, academic research and continuing proprietary research to create a dynamic, market aware, diversified asset allocation approach.

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INVESTMENT MANAGEMENT

We provide equity, fixed income, balanced, futures and currency management through customized separate accounts. We can be turn key service providers through our various investment strategies or comprehensive capital managers using our proprietary asset allocation models.

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OUR TEAM

People that contribute to Atlas Capital Advisors' Success.



Jonathan E. Tunney, CFA
Managing Partner - PM

Atlas founder, Jonathan (Jono) Tunney, brings deep and broad expertise to bear on global economic analysis, asset allocation, business valuation, portfolio design, and risk management. His experience includes responsibility for worldwide currency risk management and more than \$100 billion in annual foreign exchange transactions as Director of Foreign Exchange for Hewlett Packard. He holds a BA in Economics and Political Science from Stanford University, an MBA in Finance from the Anderson School at UCLA, and the Chartered Financial Analyst designation.



Albert J. Gutierrez, CFA
Partner - PM

Albert J. Gutierrez has been at Atlas since 2010 and has over 30 years of extensive capital markets experience including several executive positions at multi-billion dollar institutional investment advisers. Bert was Chief investment Officer at SCM Advisors, EVP of portfolio management and trading at American General Investment Management, and SVP responsible for research, trading and insurance asset management at Conseco Capital Management. He holds a BS in Economics, The Wharton School, University of Pennsylvania and a Chartered Financial Analyst designation.



William Preston Raisin
Partner

William Preston Raisin joined Atlas Capital as partner in September 2011. He has over 30 years of capital markets and money management experience. Preston began his career building a book of high net worth clients for Shearson Lehman Brothers in 1986 through 1988, and then spent four intensive years managing money under the Donaldson, Lufkin and Jenrette research platform. He joined First Boston in 1992 and subsequently moved to Bear Stearns in 1995 where he managed a proprietary fund and became one of the firm's youngest partners. Preston holds a B.A. in English Literature from UCLA.



QUARTERLY ASSET ALLOCATION

ATLAS RISK ASSET ALLOCATION

Asset allocation is the most important decision one can make as an investor. Each quarter, Atlas Capital Advisors updates estimates of the expected returns of each asset class, and adjusts allocations accordingly. We make these decisions in a systematic repeatable way using approaches grounded in academic evidence.

We are fundamental investors. We seek to increase weights in asset classes that are attractively priced, and reduce weights in those that are not. Attractively priced asset categories, with higher expected returns, have “good value” in our terminology.

[Read More\(\)](#)

RESOURCES

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"I believe in evidence. I believe in observation, measurement, and reasoning, confirmed by independent observers

- Isaac Asimov, The Roving Mind"



CORE CONCEPTS

INSIGHTS

EXTERNAL RESEARCH

DATA ANALYSIS



(<https://www.atlasca.com/resources/atlas-portfolio-strategies/>)

Atlas Portfolio Strategies

Atlas provides Investment Management Services across multiple asset classes with unique sub-strategies that capitalize on specific predictive factors implemented in a systematic, disciplined, unemotional, academically rigorous investment process...

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(<https://www.atlasca.com/resources/atlas-portfolio-strategies/>)



What Is Factor-Based Investing?
(<https://www.atlasca.com/resources/what-is-factor-based-investing/>)

Factor-Based Investing (also known as “Smart Beta”) attempts to identify specific factors historically associated with stronger risk-adjusted returns, and create index weightings with inclination toward

one or more of these factors. Factor-Based Investing...
(<https://www.atlasca.com/resources/what-is-factor-based-investing/>)



(<https://www.atlasca.com/resources/value-over-growth/>)

In 1992-1993, Eugene Fama and Kenneth French published several academic papers that provided investing ideas that expanded on the classic Capital Asset Pricing Model (CAPM). They showed that over long periods of time, 90% of returns from diversified ...

(<https://www.atlasca.com/resources/value-over-growth/>)

Read more ▶ (resources/core-concepts/)

Atlas Capital Advisors

We are an independent, fee-only registered investment advisor dedicated to providing unbiased advice to our clients. Our specialty is the design and management of sophisticated, tax-sensitive portfolios for individuals and institutional investors. We seek to produce desirable returns while minimizing

costs through proven investment strategies that include separate equity and fixed income securities.

CONTINUE READING (<https://www.atlasca.com/#atAbout>) →

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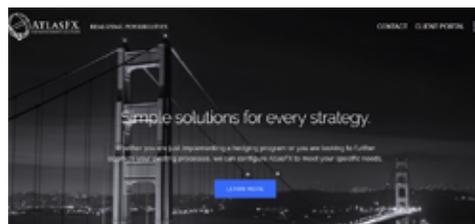


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ATLAFX®

Atlas Risk Advisory Inc.

AtlasFX is the industry's only all-in-one platform that helps you Access, Analyze, React to and Visualize your global currency risk.



VISIT ATLASFX® (<https://atlasfx.com/>) →

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