

# YOUR CHALLENGES

## WHO WE ARE & WHAT WE DO

Hillview Capital Advisors, LLC provides financial advisory services to wealth creators, their families, and foundations. Since our founding, we have employed an open architecture approach to financial management. We provide a full range of capabilities associated with a dedicated family office, as well as the benefits associated with a large wealth management firm.

Scaled to deliver a differentiated client experience, the firm is focused on providing comprehensive wealth management solutions that are objective, free of conflict and customized to the individual needs and aspirations of each client.

# YOUR WEALTH

# SERVICES

## **WEALTH MANAGEMENT ([HTTPS://WWW.HILLVIEWCAP.COM/SERVICES/#107](https://www.hillviewcap.com/services/#107))**

Hillview provides a broad range of capabilities associated with a dedicated family office. One of our differentiating characteristics in the industry is our approach to creating customized solutions for clients.

Our focus on the delivery of holistic planning services—a deep understanding of a... Read more... (<https://www.hillviewcap.com/services/#107>)

## **OUTSOURCED CIO ([HTTPS://WWW.HILLVIEWCAP.COM/SERVICES/#109](https://www.hillviewcap.com/services/#109))**

At Hillview, we understand the investment challenges that face institutional clients. We offer foundations and endowments customized asset management solutions that are aligned with each organization's unique mission, performance objectives and management culture.

Our firm has a long history... Read more... (<https://www.hillviewcap.com/services/#109>)

## **PHILANTHROPIC ADVISORY SERVICE ([HTTPS://WWW.HILLVIEWCAP.COM/SERVICES/#108](https://www.hillviewcap.com/services/#108))**

At Hillview, we engage our clients in value-based conversations about philanthropy early on in our relationship. This is to clearly understand their intentions, assess all available options, analyze the benefits and potentials of each element, and finally create a custom-tailored plan... Read more... (<https://www.hillviewcap.com/services/#108>)

RELEVANT CASES  
([HTTPS://WWW.HILLVIEWCAP.COM/SERVICES/#CASE-  
POST-  
PHILANTHROPIC](https://www.hillviewcap.com/services/#case-post-philanthropic))

# YOUR GOALS

## PROCESS

### **1** INVESTMENT PHILOSOPHY ([HTTPS://WWW.HILLVIEWCAP.COM/PROCESS/#110](https://www.hillviewcap.com/process/#110))

We believe Hillview's investment philosophy represents the "Triumph of Common Sense" in a crowded and challenging investment environment, where we pursue what is in the best interests of our clients. The firm combines the research and analytical strengths of a high quality institution with... Read more... (<https://www.hillviewcap.com/process/#110>)

## 2

### RESEARCH PROCESS ([HTTPS://WWW.HILLVIEWCAP.COM/PROCESS/#111](https://www.hillviewcap.com/process/#111))

Our investment team employs a multi-disciplinary approach in its decision-making process. We analyze a broad range of asset classes and strategies, and develop forward looking projections of risk and return across a number of potential scenarios. Those which appear most attractive and positively... Read more... (<https://www.hillviewcap.com/process/#111>)

## 3

### RISK MANAGEMENT ([HTTPS://WWW.HILLVIEWCAP.COM/PROCESS/#112](https://www.hillviewcap.com/process/#112))

# OUR TEAM

# PARTNERS



**David M. Spungen**

*Chief Executive Officer*



**Jonathan J. Hochberg**

*President*



**James F. Madden**

*Managing Director, Wealth Advisory Services*



**Lizanne Kelly**

*Partner, Chief Financial Officer*



**Paul Platkin, CFA**

*Partner, Chief Investment Officer*

MEET THE REST OF  
OUR TEAM  
([HTTPS://WWW.HILLVIEWCAP.COM/TEAM/](https://www.hillviewcap.com/team/))

# OUR THOUGHTS

# INSIGHTS ([HTTPS://WWW.HILLVIEWCAP.COM/INSIGHTS](https://www.hillviewcap.com/insights))



## HILLVIEW MARKET SUMMARY - SEPTEMBER 2017

(<https://www.hillviewcap.com/hillview-market-summary-september-2017/>)

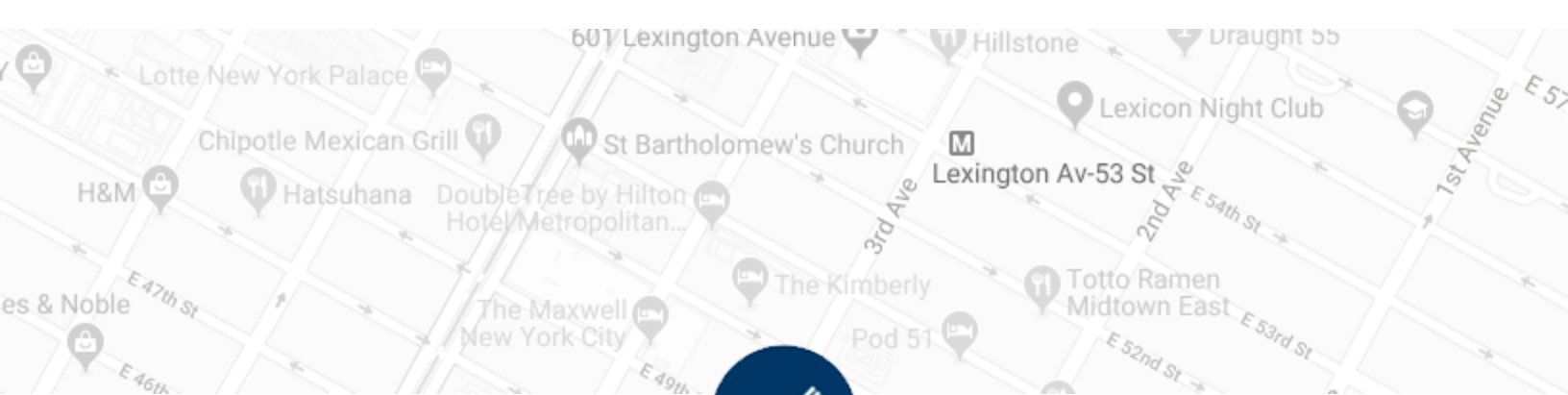
## Inside September's Market Summary:

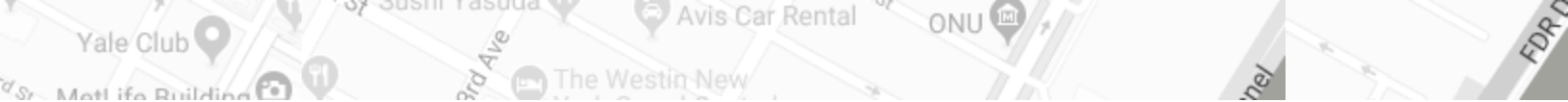
Read more...



## HILLVIEW MARKET SUMMARY - AUGUST 2017

(<https://www.hillviewcap.com/hillview-market-summary-august-2017/>)





([HTTPS://WWW.HILLVIEWCAP.COM/](https://www.hillviewcap.com/))

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