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About Menlo Advisors

Thanks for visiting.

Menlo Advisors LLC is an independent Registered Investment Adviser providing fee-only separate account management for individuals and families. Our independence from control by a bank or brokerage firm allows us to think and act independently when building client portfolios. "Registered" means that we are required to provide information to the Securities and Exchange Commission; you can find that filing [here](#). Please type in "menlo" at the "Firm Name" prompt and follow the links. We highly recommend that you research the SEC's site for any adviser you're considering.

Our experience and expertise are most helpful when they are applied to your specific needs and goals. We typically approach the investment process by looking at the big picture: What do you own, how do you own it, and how do you spend it. Importantly, your estate planning desires, income tax concerns and insurance needs are addressed as part of our due diligence (the latest marketing term for what we do is "wealth management").

After the initial analysis and subsequent discussions, we construct a client portfolio that likely will be diversified and global in composition. If needed or desired, we have access to venture capital, private equity, real estate and other alternative assets to complement the core portfolio we manage. Our goal is to simplify when possible and to augment when appropriate. As your situation changes, we adapt and enhance your portfolio.

We're not a black box performance factory in which your contact with the firm relies on a relationship manager who reports to a regional director, or a client support specialist who is periodically allowed to attend an investment committee meeting. Rather, your contact is always with the portfolio manager who is directly responsible for implementing your investment strategy.

Finally, if you need an introduction to an accountant, attorney or other service provider, our broad range of contacts virtually ensures a great fit.

We look forward to sharing additional information about Menlo Advisors with you. Just click on the info link to your left to arrange a time to talk or meet.