



Metis Capital Management LLC



**ABOUT**



**BLOG**



**SERVICES**



**PROCESS**



**CONTACT**



**BIO**

**Initial Evaluation**

In our initial meetings with clients, we go to great lengths to clarify and define their financial goals in order to establish a smooth and successful long-term relationship. Tax implications are carefully considered; investment timelines are developed through evaluating current assets and earnings against current and future goals. Reviewing retirement and upcoming life event needs is a vital step in our process, as well as defining risk sensitivity levels. We jointly establish guidelines for frequency of future evaluation, communication, and reporting. For our institutional clients, we work with liaisons, committees, and Boards of Directors so that portfolio parameters are clearly constructed. Confidentiality of sensitive information for all of our clients is of the utmost importance.

## **Investment Styles**

We tailor each portfolio to our clients' needs, with varying degrees of allocation of equities, fixed income, and cash (and cash equivalents). We offer growth, balanced, and fixed income styles. Both cash and margin accounts are available.

## **Reporting And Ongoing Evaluation**

Our portfolio accounting software, Advent/Axys, is widely used among top industry professionals. We provide quarterly appraisals in conjunction with monthly custodian statements, and produce other reporting as needed. For those clients who report to a board of directors or other governing entity, we go extra lengths to satisfy additional requirements. The extensive reporting options available to us combined with clear evaluation procedures allow us to make sure our clients' investment goals are met.

## **Custodial/Brokerage Options**

We currently maintain relationships with both Fidelity and TD Ameritrade so to offer a choice of service and fee/commission levels for our individually managed accounts.

## Our Process

Metis Capital portfolio managers continuously employ both top down and bottom up analysis to optimize our investment decisions. Reducing risk while still taking advantage of growth opportunities in the market are our primary goals. We focus on what we believe are high-quality industry leading stocks, and prefer to recommend companies that we have followed for a lengthy period of time.

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# CONTACT US

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## METIS CAPITAL MANAGEMENT LLC

411 Theodore Fremd Avenue, Suite 206 South,

Rye, NY 10580

Phone. 914-315-6850

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