



## INVESTMENT COMMITTEE SERVICES

*Maximum Your Team's value to Drive Results*

The purpose of your investment committee is to oversee your investment portfolio and to help you achieve your long-term financial and investment goals. However, even if your committee is currently meeting your financial goals, it does not necessarily mean that it is functioning like a well-oiled machine, or that all of your advisers are adding their maximum value to your portfolio. For example, you might ask yourself, “Do all of my advisers share the same understanding of my goals, or do they have different attitudes and ideas about how to manage my assets?” “Do they have personal biases that might interfere with rational decision-making?” Thinking about how well your committee operates can help you develop a more productive investment portfolio and evaluate their ability to meet your long-term goals.

As a member of your investment committee, I will help enhance your portfolio's investment returns, maximize the collective value of your advisers, drive efficiencies and provide you with an unbiased ‘go to’ resource for decision-making. With over 25 years of experience, my unique combination of legal, financial, investment, entrepreneurial and operational expertise is highly regarded by clients for providing peace of mind.

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“Advisers focus on their individual areas of expertise. I focus on the whole, synthesizing the collective expertise of all your advisers. I make clear recommendations in your best interest, while you maintain control of decision-making.”

**Jack Reynolds**

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### How Can a Private Investment Counselor Help Lead Your Committee without Dominating the Process?

Over the years I have worked with superb investment committees, and I have seen some committees struggle. As a member of your committee, here are some ways that I will help you elicit the most value from all your advisers, make the best decisions for your portfolio, and maximize your ability to achieve your long-term goals:

- Provide independent, unbiased, highly customized fiduciary counsel.
- Create a powerful, productive committee by promoting constructive relationships and discussions among its advisers.
- Develop a disciplined investment system to avoid conflicts that often arise between investment theory and behavioral predispositions.
- Broaden your exposure to investment strategies beyond the scope of conventional thinking.
- Assist with developing and implementing an effective investment strategy.
- Ask tough questions using facts and data to challenge personal biases and debate the issues at hand, rather than allowing strong opinions to prevail.
- Help advisers navigate through periods of severe financial stress and market disruption, avoiding ‘fiduciary fatigue.’
- Explore opportunities for intergenerational participation.
- Ensure that decisions are implemented in a timely manner.