GLOBAL
ADVISOR GROUP

Dedicated to serving the retirement planning needs of the international school community.

Institutional Investment Management

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GLOBAL ADVISOR GROUP

What is Institutional Investment Management?

Organizations seeking to earn higher returns on their cash reserves can work with a financial advisor to establish and maintain a portfolio tailored to their unique needs and risk tolerance.

Why Work with Global Advisor Group

For over 20 years, we have specialized in helping international schools earn higher returns on their cash reserves through tailored portfolio management strategies.

A Guided Approach to Investment Management

Our strategies go beyond traditional bank rates, offering more conducive options for potentially higher-yielding investments.

Flexible Strategies for Your Needs

Whether managing an operating budget or reserve funds, we leverage capital markets to pursue the goals and objectives of the institution.

There is no guarantee that any investment process or strategy will achieve its objective. As with any investment vehicle there is always the potential for gains as well as the possibility of losses.

Our Financial Advisors Will Guide You Each Step of the Way

Our Financial Advisors work as **Fiduciaries,** meaning they act in the client's best interest with honesty, loyalty, and care.

1

INVESTMENT POLICY STATEMENT

Our advisors work with your Board of Finance Committee to establish an Investment Policy Statement (IPS). The IPS acts as a benchmark and guideline for all investment decisions.

2

PROCESS ESTABLISHMENT

We establish a clear structured process based on the IPS and sound governance to meet your institution's needs.

3

TARGET ALLOCATIONS

Risk ranges and rebalancing guidelines are established around target allocations to various asset classes used in the portfolio.

4

DUE DILIGENCE

Due diligence and selection of portfolio managers are practiced to offer a reasonable probability of helping achieve the stated objectives.

5

MONITORING AND REPORTING

The progress of the portfolio is monitored on an ongoing basis, including reporting, review meetings, and recommending adjustments when circumstances warrant.

6

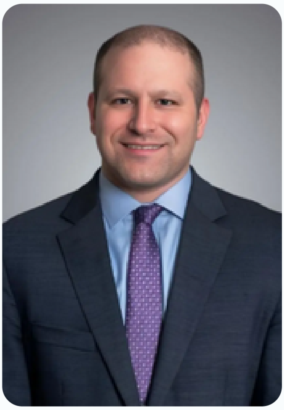
ACCOUNT FEES

Portfolio fees range depending on the specific agreement.

OUR SERVICE TEAM

James T. Barnette, Jr. CFP®
Chief Executive Officer

Daniel Malloy
Institutions & Endowments



Joe Masella, CIMA®
Investment Strategist