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PEOPLE

Who is making the decisions?

ADJUSTED
FOR **RISK**

With Ryan Nauman



Great strategies start with great people. Evaluate the experience, alignment, and stability of the team responsible for your client's capital.

WHAT TO LOOK FOR

- ✓ Proven, relevant experience
- ✓ A collaborative, stable team
- ✓ Low key-person risk
- ✓ Skin in the game—team members invest alongside clients
- ✓ A documented succession and transition plan

KEY QUESTIONS TO ASK



Who is responsible for the investment decisions?



How long has the portfolio manager managed this strategy?



How deep and experienced is the investment team?



How dependent is the strategy on one individual?



Is there a clear succession plan?



WHY IT MATTERS

People drive the process. The right team with the right incentives leads to better outcomes.



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