03 | PROCESS

How does the philosophy become a portfolio?

ADJUSTED FOR RISK
With Ryan Nauman

A repeatable process turns belief into disciplined action. It defines how ideas are generated, tested, and implemented.

KEY QUESTIONS TO ASK

- How is the investment universe defined?
- What is the portfolio construction process?
- What risk management tools and limits are used?
- What is the sell discipline?
- How is the process customized for individual clients?

WHAT TO LOOK FOR

- A clear, repeatable, and disciplined process
- Defined risk controls and position limits
- A consistent approach to buy and sell decisions
- Ability to personalize without compromising discipline
- Ongoing evaluation and refinement

WHY IT MATTERS

A well-designed process helps ensure consistency, discipline, and alignment with client goals.

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