Stanhope Capital — Services

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Our objective is to protect and increase the wealth of our clients by providing superior risk-adjusted returns throughout cycles. We add value in two areas: **asset allocation (strategic and tactical) and fund selection**.

For Private Clients

We work with families to identify and clarify their wealth goals. We use this to help create a roadmap for assets: from creating your investment strategy through implementation and monitoring markets, we keep your portfolio in line.

We operate either on a discretionary or advisory basis, depending on how much control the investor wants to have over day-to-day decision making.

Our team selects best-of-breed funds wherever they happen to be. **We are not tied to in-house products.** Given our scale, we normally invest through the lowest fee share classes and often negotiate better access terms, thereby improving access and reducing costs for our clients.

Partners and employees invest their personal wealth alongside clients.

For institutions and institution-sized families (OCIO)

The OCIO service is built on a holistic understanding of the investor's evolving situation. The approach is engaged and proactive, and is flexible enough to allow inputs and participation by the investor's own investment staff or family members. Thus, it can be either discretionary or advisory, or even a hybrid, split by asset class. Whichever option is chosen, our team regards itself to be fully accountable for meeting the investor's broader aims.