



Institutional Investment Management



WHY ADVANCED CAPITAL GROUP FOR YOUR INSTITUTIONAL INVESTMENT MANAGEMENT?

We know collaborative portfolio management. Corporations, insurance companies, banks, public entities, foundations and endowments looking to preserve and grow invested assets need a customized approach to investing that aligns with each unique set of needs and circumstances.

Our portfolio philosophy is to accept risks that can be managed in a portfolio context to deliver strong risk-adjusted returns, while minimizing the risk of catastrophe.

CUSTOMIZED INVESTMENT STRATEGY

A customized portfolio is the most efficient way to effectively meet your unique objectives. You can count on our team's perspective, market intelligence and collaboration to seize market opportunities. You'll gain:

- ▲ Experienced portfolio managers and analysts with expertise in a variety of sectors and who have navigated numerous market cycles
- ▲ Strategic and collaborative portfolio planning
- ▲ Proprietary internal credit analysis methodology
- ▲ Insightful monthly reporting including cash flow analysis, rate shock analysis and portfolio trending reports

Put our vision to work for you

We are passionate about fostering creative ideas and exploring new opportunities for our clients. Contact us to learn how a customized relationship can help you succeed.

AWARD-WINNING SERVICE

Advanced Capital Group is a consulting firm and Registered Investment Advisor (RIA) based in Minneapolis, MN. Our expert team uses a proactive and collaborative approach that enhances financial results for organizations and individuals.

Return, independent of risk quantification, can be meaningless. The efficiency of return relative to the risk taken, is the true measure of success.

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INDEPENDENT FIDUCIARY ADVICE

As a fiduciary, we work in a truly collaborative manner to establish portfolios that continuously work to achieve your goals. The benefits of being a completely independent SEC Registered Investment Advisor include:

- ▲ Unbiased recommendations
- ▲ Complete fee transparency and competitive cost structure
- ▲ Competitive procurement with no inventory of securities to motivate recommendations
- ▲ No sales commissions to encourage unnecessary transaction costs

We direct efficient use of investment funds while holding safety of principal as paramount.

EFFICIENT INVESTMENT ALLOCATION

Market information and insightful perspectives are crucial to deliver strong risk-adjusted returns. Our processes have been developed to maximize efficiency for you and your portfolio:

- ▲ Tax efficiency through exposure to multiple asset classes
- ▲ In-house monitoring and managing of credit risk
- ▲ Ability to utilize various custodial platforms
- ▲ Monthly reporting and online access

INVESTMENT COMPLIANCE

All organizations with invested asset portfolios face investment compliance requirements whether it be internal, external or both. Our team ensures:

- ▲ Adherence to Investment Policy Statements (IPS)
- ▲ Best practice updates and recommendations for improved IPS oversight
- ▲ Regular tracking and reporting on state/regulatory investment limitations and portfolio guidelines
- ▲ Buy/Sell trade documentation and assistance in regulatory examinations as needed



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