

The increasing complexity and global nature of the investing landscape, combined with the cost of in-house staff and technology have made outsourcing a very efficient and practical approach.

As an outsourced Chief Investment Officer, ECM serves families, trust companies and endowments that are seeking to access top-level asset management to oversee their investment program. We provide a fully staffed, all-inclusive professional CIO service at a fraction of the cost of carrying on this work internally. As a regulated advisor serving in a fiduciary capacity, we view our role as *your* Chief Investment Officer as a long-term steward of *your* capital.

We will work with you to develop or review your investment policy, implement an investment strategy, and provide clear and comprehensive reporting.

The main benefits of working with ECM as your outsourced CIO are:

- Direct access to a team with decades of experience in all asset classes. Our senior partners will work personally with you.
- Continuity of management: avoid disruptions caused by staff turnover.
- No conflicts of interest: we sit on your side of the table.
- Comprehensive reporting: includes benchmarking, fees, and total asset allocation.
- Supervision of all assets: multiple custodians, private placements and companies, real estate.
- Implementation: we are discretionary investment managers, rather than consultants, and will manage your portfolio to your specific goals and guidelines.
- Review and due diligence of private placements.
- Management of complexity: whether a family with several members or a trust with many clients, we can provide tailored services to each of your internal clients.
- Collaboration with other advisors: we will coordinate with your existing trusted relationships for tax, legal, banking and custody services to include their input into the investment program.