





Separate account structure

Holdings held directly in your account

Innovation Strategy

This strategy invests in management teams and companies where innovation is key to success.

Themes

- Disruptive Tech: 3D printing, metaverse, virtual reality, cryptocurrency, payment processing, gene editing, diagnostics, machine learning, AI, driverless technology
- **Robotics**: Construction, commercial, personal, healthcare
- **Semi-conductors**: Infrastructure for technology revolution
- Social Media: Marketing, dating, advertising, metaverse

Process Notes

- Process leads to ownership of highly innovative companies that are helping to solve societies biggest challenges
- Nascent products that will be a major part of life 5-10 year from now
- Sustainable business models
- 100% liquid separate account structure

Managers



Timothy Duchesneau
Director of Research
PORTFOLIO MANAGER



Matt Ristuccia MBA, CFA
Chief Investment Officer

For more information about the strategy, contact:

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