INVESTMENT MANAGEMENT

Legacy Trust

Legacy Trust Investment Philosophy

We take the time to develop a deep understanding of your family's goals, preferences and values before we design a custom investment plan that works for you. Based on your personal goals and objectives, we'll craft a strategic asset allocation plan based on our long term market outlook and build a thoughtfully designed portfolio to meet your needs.

INVEST YOUR WAY

To provide you the best service, our investment process includes developing your individual Investment Policy Statement (IPS). The IPS provides your investment manager with a clear understanding of how to effectively allocate, invest, monitor and evaluate the assets in your portfolio.

An IPS typically includes:

- Your return objectives and risk tolerance
- Investment constraints including liquidity and income needs, capital appreciation needs, tax and legal considerations and any unique circumstances
- Strategic targets and tactical ranges for asset allocation
- Permitted asset classes and investment vehicles, diversification requirements and quality and maturity parameters

QUALITY

We invest in high-quality businesses with sustainable competitive advantages.

GLOBAL UNIVERSE

We source investment opportunities globally while maintaining a strategic tilt to U.S. allocations.

TAX + COST EFFICIENCY

We invest for the long term, minimizing costly turnover and market timing.

SIMPLICITY

We minimize allocations to opaque investment strategies that often carry high fees.

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