

# Monitoring

Needs Analysis

Strategic Asset Allocation

Manager Selection

Tactical Asset Allocation

Portfolio Construction

Monitoring

Rebalancing

Monthly Reporting

- Ongoing monitoring is a crucial part of our involvement with our clients' portfolios.
- Our investment committees meets on a regular basis to review the underlying managers, discuss changes to the economic situation which could warrant a change to our investment strategy and to share ideas.
- New managers are presented to the investment committee for their consideration and comment.