

HIGH NET WORTH INVESTORS

Trust built on reason.



Robert Maillart's Swiss Salginatobel Bridge wastes nothing while beautifully countering the forces of gravity.

ONE DAY
IN JULY

High Net Worth

ONE DAY
IN JULY

You should not assume that wealth allows you to buy a better investment program than a collection of diversified index funds. While it may sound appealing, we have not been able to find data that substantiate the claim that greater wealth gives access to statistically reliable outperformance over a medium to long period of time.

There are areas that we customize for high net worth investors. Taxation is an important issue, and we have innovative solutions for minimizing it. Innovative, but not "gray area." When desired, we work closely with accountants and estate attorneys.

We believe simplicity improves your life and we do not conflate wealth with complexity.

Eventual capital disbursement, whether via inheritance or charitable giving, are also areas that we explore with high net worth clients.

For investors interested in environmental investing, we have a dedicated solution.

The best way to understand the fees and opportunity costs you have paid is to have us run a simulation of your current program against our low-cost indexing approach. If a gap exists, and you are not satisfied with the explanation, a switch may be in order.

www.onedayinjuly.com

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