EASTBAY
INVESTMENT SOLUTIONS

Your *OCIO* Partner:

What You Get With East Bay Investment Solutions

East Bay is the outsourced investment team behind your planning practice, not a vendor you check in with once a quarter. A shared foundation, shaped around you. Here's what that actually looks like.

What's included:

- Model Portfolio Construction and Maintenance
- Proactive Portfolio Analysis & Manager Due Diligence
- Proactive Investment Recommendations
- Economic and Market Commentary
- Annual On-Site Office Visits
- White-Labeled, Ready-to-Use Client Communications
- Exclusive Access to East Bay Client Resource Library
- Documentation of Investment-Related Discussions and Decisions
- Wholesaler Calls & Product Pitches, Fielded For You

A la carte, by request:

Need something outside the standard scope? These are examples of the kind of a la carte work we take on, and we're always glad to build around what your practice actually needs.

- Client and prospect portfolio reviews
- Custom research topics by request
- Client communications specific to your firm
- Evaluation of portfolio management strategies, processes, or tools
- Virtual or in-person meetings with clients and prospects

These are examples only. Other a la carte services are available by request.

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What That Feels Like, ***In Practice***:

Every deliverable on the previous page runs on the same five commitments.

CLARITY

Investing shouldn't feel like a black box. With East Bay, you always know why we're recommending what we're recommending. Plain-language documentation on every investment discussion and decision we make together, and market commentary that comes with the talking points already written, so nothing gets lost in translation between you and your clients.

CONFIDENCE

When experienced investment thinking is supporting you, client conversations get steadier. Every recommendation carries the weight of CFA credentialed experience behind it. We bring you new investment ideas before you have to ask for them, and as a fellow RIA, we build our process to support your fiduciary responsibility.

COMFORT

Client questions don't keep a schedule. Are you ready for them? We are. We cover every inbound investment opportunity and every question that stretches past your bandwidth, so you're never caught without an answer. Plus, you deserve the emotional support and the peace of mind to sleep better at night, knowing your clients and their portfolios are being looked after.

CAPACITY

You don't need to carry the load on your own. Think of us as the research department you don't have to staff. Freeing up the time you'd otherwise spend on investments means more room to grow your practice, expand into more sophisticated offerings, or simply focus on whatever matters most to you. Dedicated a la carte time is already built in for whatever comes up outside the usual scope.

COMMUNITY

We show up, literally and otherwise. An annual visit to your office for client meetings, appreciation events, or team planning. Client Q&A sessions and webinars can put our team directly in front of your clients. Plus, practice management insight goes beyond investments into how you're actually running your firm. And you become part of a community of like-minded peers with whom to share ideas and compare notes. You're not doing this alone.