



### **A Dynamic Perspective for Savvy, Affluent Investors**

High-net-worth individuals with alternative investments in their portfolios – or a keen interest in acquiring them – have been migrating to Enviso Capital. Based in San Diego with additional offices in Arizona and Oregon, Enviso has rapidly grown to become one of the largest independent, SEC-registered financial services firms in Southern California.

An agile, boutique firm known for their innovative approach and active pursuit of alternative investments, Enviso has achieved enormous success since its inception in 2007. With clients throughout the U.S. and \$180 million in assets under management by 2008, Enviso was ranked by the San Diego Business Journal as one of the area's top money management firms and by San Diego Magazine as Five Star Wealth Managers. No surprise, given the firm's running start: 80 years' collective experience in the industry – both in the institutional and independent arenas – as well as their firm understanding of the entrepreneurial, high-net-worth dynamic and not to mention their penchant for bringing more compelling and intuitive service offerings to their affluent clientele.

### **Attuned to Investors' Complex, Unmet Needs**

"We have been in the industry for decades, and we knew high-net-worth individuals were absolutely under served," explains Ryan N. Bowers, Enviso's Managing Principal. "They may have lacked integration of their multiple advisors – an inefficient and burdensome situation. Or, they held a hodgepodge of traditional and alternative investments with no over arching strategy."

Bowers and his team imagined a better way.

"We asked, 'What if we facilitate that integration, working closely with clients' existing team of advisors to provide that much needed strategic oversight as their lead wealth advisor.'"

### **Opening Doors to New Opportunities**

Like its clients, the Enviso team recognizes the tremendous potential of alternative investment vehicles. The Enviso team operates deftly in the dynamic alternative investment realm. Its advisors provide clients with opportunities once afforded only to institutional and ultra-high-net-worth investors through proprietary funds, managed syndicates and outside fund-of-fund solutions. Says Marc Seward, another of the firm's principals, "We understand the value of alternatives to the portfolio and our clients have reaped those rewards. It is unfortunate the number of investors out there over the past few years that thought they were diversified or thought that they had long-term time horizons. Our clients understood the balance between traditional and alternative asset classes and took advantage of the extenuating benefits of asset dis correlation."

### **Markedly Distinct Money Management**

Enviso's signature approach to active asset management begins with embracing and integrating each client's established professional network to ensure clarity of strategic financial objectives. Add to that a truly authentic, independent investment philosophy, extremely high-tech analytical and reporting tools, diverse investment offerings and expert tax management, and you get an advisory firm dedicated not only to bringing order to a complex process, but also providing a deeper, broader perspective to optimizing capital – and to satisfying clients over the long term.

"We know we are in good company in our industry," Bowers says. "We know there are other solid RIAs in our market. But we believe we are the leaders and that we distinguish ourselves in important ways – just like our clients did in achieving their success. And we will continue to look for new ways to do so." 🌟

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