OPCM SOLUTIONS

A unique approach to investing since 1937

Osborne Partners Capital Management, LLC and its predecessors have remained committed to providing wealth management for families, individuals, foundations and endowments since 1937. Headquartered in San Francisco since inception, OPCM employs an experienced investment management team. Each Portfolio Manager and Analyst possess an MBA, the CFA® (Chartered Financial Analyst®) charter, or both designations and averages more than 20 years of experience in financial markets.

LEARN MORE

Osborne Partners believes:

1. An actively managed, diversified portfolio of multiple asset classes results in better long-term risk-adjusted performance over other investment styles, such as mutual funds, ETF managers and managers of managers.
2. Individuals should have access to the multi-asset class style used by large foundations and endowments, without the side effects of higher fees, high volatility, low liquidity, no customization and poor tax efficiency.
3. Reducing downside capture is the most important ingredient for solid long-term performance.

OSBORNE PARTNERS
Capital Management, LLC

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Portfolio Management

The cornerstone of wealth management is flexible and responsive asset allocation. We allocate a client's portfolio with the goal of achieving a balance between calculated risk and the expected return on investments. In equities, our clients receive a diversified equity solution balanced between large-, mid- and small-cap categories and across all industries. In fixed income, we use individual bonds tailored to a client's unique time horizon, income needs, and tax situation. In addition, we use our Endowment Model to diversify portfolio exposure in global equities, natural resources, real estate, alternative investments, fixed income and cash. The resulting actively-managed portfolio can be allocated among six distinct asset classes and customized to a client's unique situation.

Portfolio Counselors

Our clients work with seasoned investment professionals, Portfolio Counselors, who are their day-to-day points of contact at the firm. Portfolio Counselors work as a client's liaison to the investment team and also provide information regarding performance, portfolio holdings and other general investment topics.

Financial Planning

With CERTIFIED FINANCIAL PLANNER™ professionals on staff working closely with our clients and their OPCM Portfolio Counselor, Osborne Partners can provide an array of essential financial planning services. From retirement income projections to college education funding, as well as extensive financial plans, we are equipped to meet the planning needs of our clients whatever the situation or goal.

Income-Tax and Charitable Planning

OPCM Portfolio Counselors work closely with clients' CPAs and attorneys to coordinate tax and charitable planning into the management of a client's portfolio. Tax-sensitive portfolio strategies are tailored to the unique needs and circumstances.

Employee Stock Option / Concentrated-Position Management

Concentrated positions, stock options and grants, corporate pension plans, and restricted and control stock associated with initial public offerings (IPOs) can all result in significant risk and create unexpected liquidity vulnerabilities. OPCM has developed a proprietary strategy for these portfolio concentrations that helps to reduce portfolio volatility. The strategy creates a multi-year forecasting plan that is used over time to reduce the concentration, while helping to minimize the impact of taxes on the client.

Account Aggregation Technology

OPCM provides access to web-based account aggregation technology that empowers clients to view their financial life in one place. Online brokerage accounts, bank accounts, credit cards, mortgages, and insurance policies can easily be linked to our system and are updated daily so clients always know where everything in their financial life stands.

All OPCM Solutions are included in our management fee.

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