



# Our Services

## Advisory

### Governance

- ✓ Establish responsibilities of all parties
- ✓ Ensure goals, risk tolerance and liquidity needs are reflected

### Investment Policy

- ✓ Set, monitor and adjust policies as needed
- ✓ Perform ongoing asset allocation studies and reviews

### Portfolio Structure

- ✓ Recommend strategic and tactical allocations
- ✓ Recommend new investment strategies and solutions as needed

### Monitoring

- ✓ Provide ongoing manager/fund oversight
- ✓ Deliver comprehensive performance reporting

## Asset Management

### Structure &

### Manager Selection

- ✓ Build a portfolio consistent with investment policy
- ✓ Select best-in-class managers across traditional & alternative asset classes
- ✓ Incorporate existing managers as requested

### Review & Performance Analysis

- ✓ Provide quantitative and qualitative analysis
- ✓ Establish & monitor rebalancing guidelines

### Administration & Operations

- ✓ Management & execution of all aspects of the investment program
- ✓ Audit support
- ✓ Ongoing education

## Alternative Investments

### Key Attributes & Differentiators

- ✓ Proven experience researching, designing and implementing alternative investment portfolios including:
  - Private Equity
  - Private Debt
  - Hedge Funds
  - Infrastructure
  - Real assets
  - Volatility strategies
  - Tail-risk
- ✓ Lower fee structure than traditional “fund-of-funds”
- ✓ Negotiated favorable terms with high quality managers
- ✓ Customized approach using either single or a multiple managers in each strategy
- ✓ Full administrative, operational and reporting support

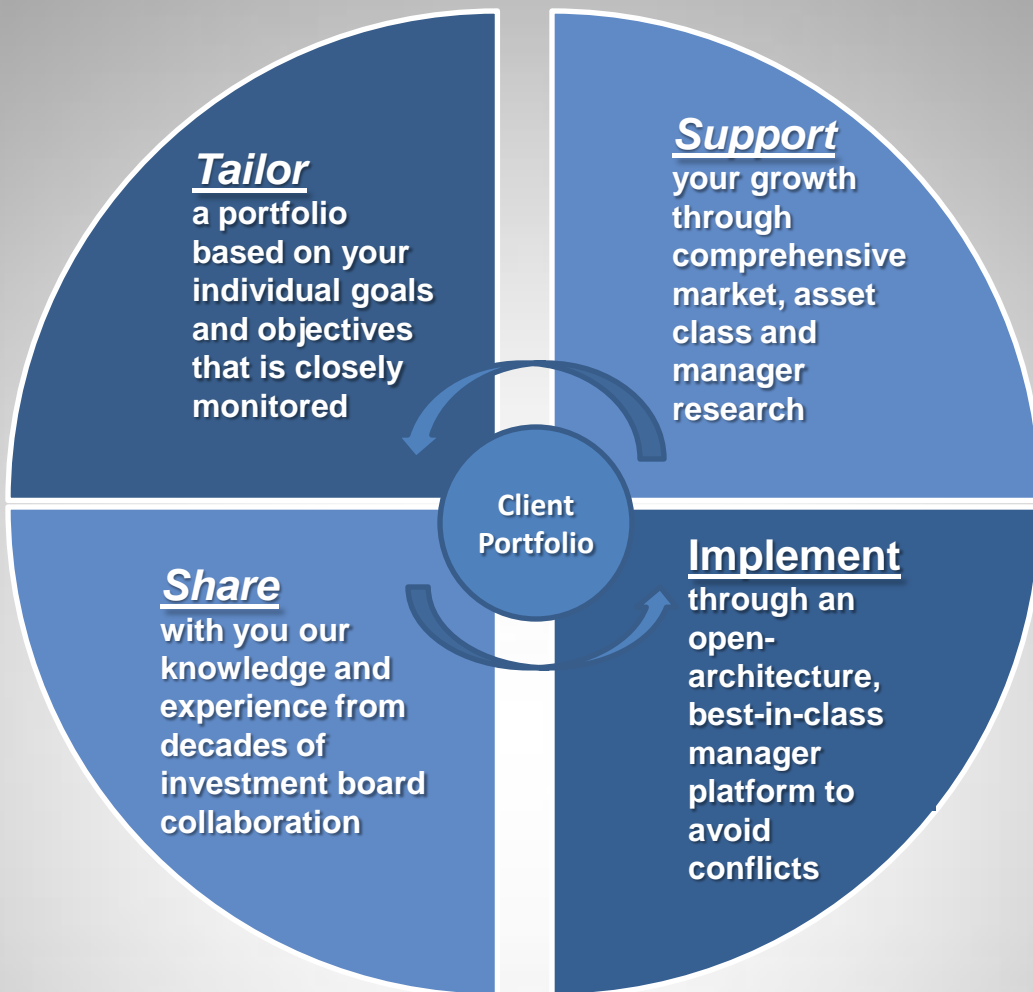


# Nu Paradigm

INVESTMENT PARTNERS

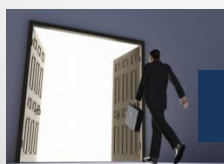
A Division of Wall Street Access Asset Management, LLC

Helping Investors Solve  
their Toughest Portfolio Challenges by  
Delivering Individually Tailored Solutions



## Experience

Our Principals have over 60 years of investment experience and have advised on over \$2 Billion in assets. We work with a wide range of investors while respecting each client's unique needs.



## Access

We offer access to top investment managers across traditional & alternative asset classes by leveraging strong industry relationships



## Cost Savings

Smart, sound infrastructure that avoids redundancies allows us to offer the best portfolio management solutions at reduced fees for our clients.

New York

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Boston

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