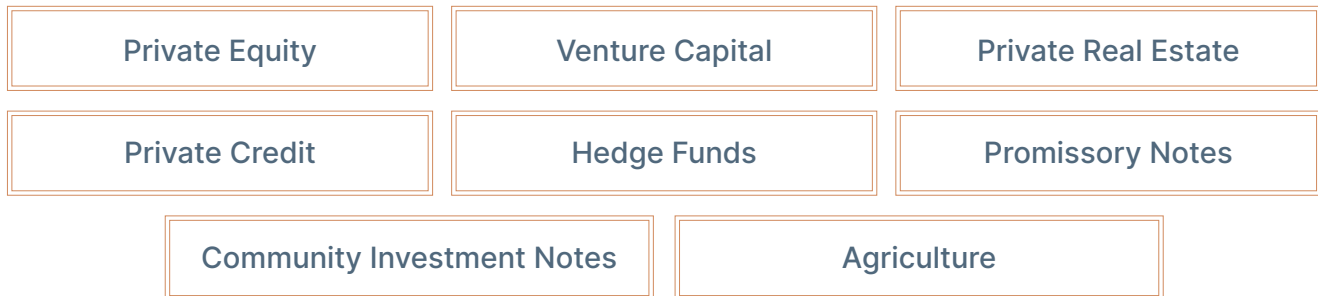




What are Private Investments and Alternatives?

Private investments and alternatives can play a key role in portfolios by complementing traditional portfolio building blocks like equity and fixed income. Specifically, the following investments can offer diversification and competitive returns, enhancing portfolio performance and mitigating risks:



Our Private Markets and Alternatives Process and Philosophy:

Baldwin Wealth Partners has helped clients allocate to private investments and alternatives since 1990.

Our approach to investing in private markets and alternatives involves working closely with clients to understand their financial objectives and determining if these investments fit with their long-term goals. Our experience across a wide range of alternatives—such as private equity, hedge funds, real estate, and more—equips us to help clients navigate these complex opportunities. That process seeks to ensure that any allocation to alternatives and private investments is thoughtfully integrated into a well-rounded investment strategy that aligns with needs and goals.

Through our extensive networks, we have access to a wide range of private investment opportunities. These opportunities include direct deals, liquid funds, and investment partnerships.

We take pride in the level of due diligence and service we and our partners bring to all our clients' private holdings. Typical private market due diligence includes reviewing:

- Investment Process
- Team
- Performance Track Record
- Market Analysis
- Fund Structure/Terms
- Legal Review

We also integrate Environment, Social and Governance (ESG) criteria into our private investment diligence. This allows us to evaluate investments' operational strengths, growth opportunities, risks, and alignment with stakeholder interests.

Lastly, we can work with our clients to understand their existing private investments and provide due diligence, oversight and advice for those portfolio holdings.

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