
Investment Solutions

To assist with the construction of your customized Vision 360 Capital Partners investment portfolio, we have a number of opportunities to choose from depending on your unique needs and goals. These range from individual equity and fixed income securities, to best of breed separate managed accounts, mutual funds, and exchange traded funds. In addition, alternative investments, such as currencies, commodities, and hedge funds may also be used to complement your portfolio.

What are separately managed accounts? Also referred to as separate accounts, or individually managed accounts, or just managed accounts, these solutions have historically been available only to large institution plans, endowments, or institutional investors, as their minimums have been well out of reach of the average investor.

Over time, investors saw the benefit and wanted access to these institutional level money managers. The rise of the mutual fund industry has partially met this need, enabling investors to pool their assets and create portfolios large enough to attract institutional money managers. What mutual funds cannot offer, due to their structure as investments shared by a group of investors, is the benefit of customized portfolio management. Separate managed accounts overcome this barrier.

Courtesy of technological advances, separately managed accounts can now provide you individual cost basis on the securities comprised within your portfolio to avoid the “mutual” nature of mutual funds. The significance of this can be gleaned by looking at the nature of mutual funds, as in their most basic form, a mutual fund is a company that invests in other companies by purchasing stocks and bonds issued by those companies. When you purchase shares of a mutual fund, you have shared ownership of the underlying securities with every other investor in that fund. The fund makes decisions on behalf of all shareholders, not based upon your needs as an individual investor.

At Vision 360 Capital Partners, when warranted, we'll select separate account managers to create and build a portfolio designed to help meet your goals and objectives.

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