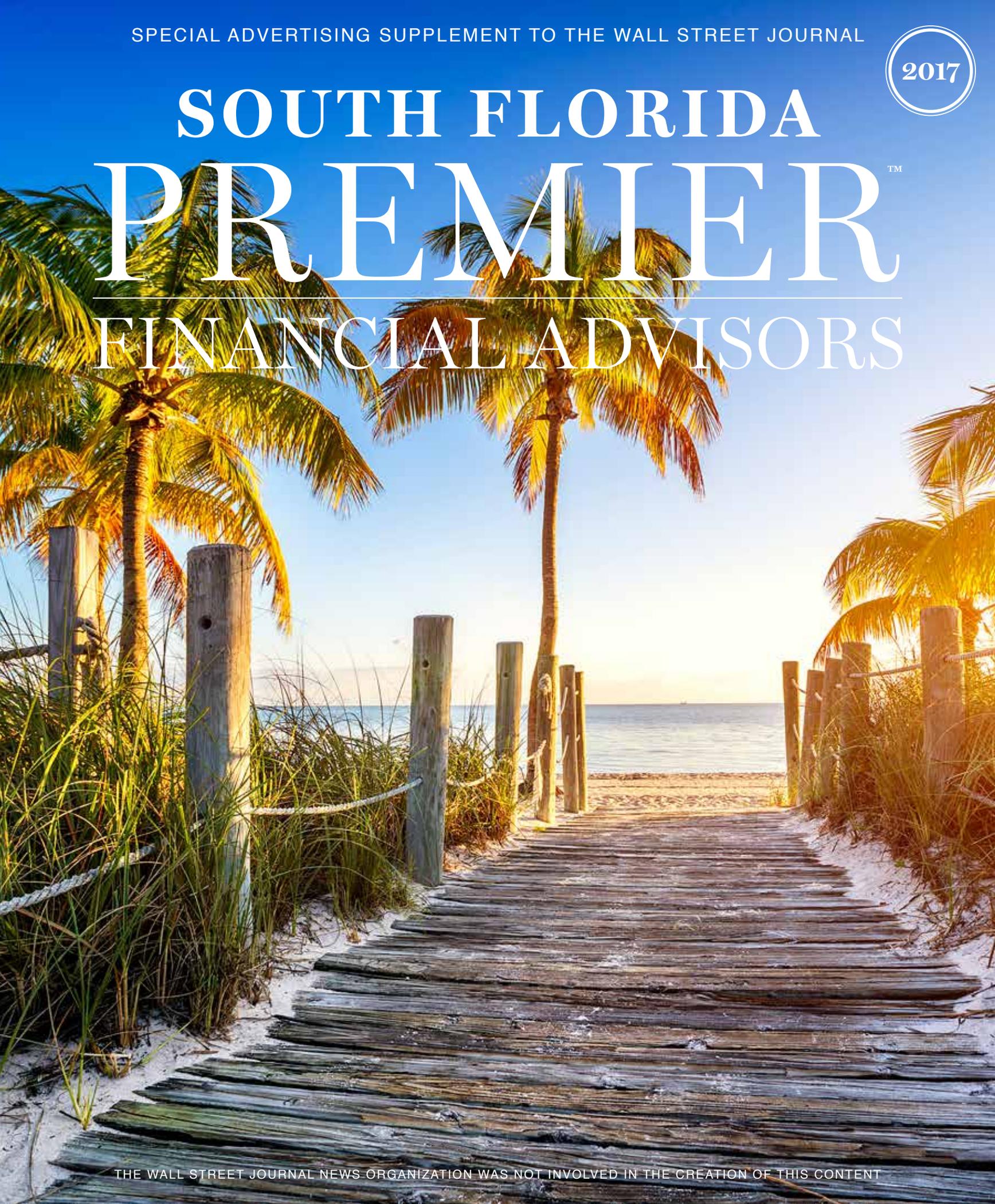


# SOUTH FLORIDA PREMIER<sup>TM</sup> FINANCIAL ADVISORS



As Seen In The Wall Street Journal



# Focus Investment Advisors

*Client-Centric, Highly Transparent, Flexible and Results-Oriented*

**N**ominated as a Five Star Wealth Manager in 2012 and 2016, Focus Investment Advisors is emerging as a competitive leader in the area of private, offshore wealth management solutions. The Miami-based firm caters primarily to Latin American and European clients with aggregated investment account sizes in excess of \$1 million.

Founder Marcelo Alves attributes his firm's success to several factors, including independent and unbiased investment abilities, expertise in the area of tax compliance, and client trust and confidence.

"We don't sell products; we do the advisory," explains Alves. Focus Investment Advisors does not offer proprietary investment products but instead works with a global network of custodian banks to source the ideal investment for each client. "Because we are independent, we don't work for the banks. We work for our clients. Our main goal is to provide them with worldwide solutions to meet their individual situations and goals."

The firm works with banks in jurisdictions including Miami, Switzerland and the Bahamas. Focus is a registered investment advisory company that is compliant with national, international and multinational regulations, and the firm holds strict fiduciary responsibility, always acting in the best interest of its clients.

Where investment advisors at larger institutions are often pressured to sell their company's own products, the team at Focus has only the client's best interest in mind when selecting investment products. "We do the selection of products with our clients, the portfolio management, asset allocation, and guidance in terms of structure for clients," explains Alves. This structure includes advice on how accounts should be opened, such as in what name, and whether in a trust, an offshore company or a United States company. "This is very important nowadays," he adds.

Equally important is the growing need for individuals to become

transparent and tax compliant with the increasingly stringent voluntary disclosure regulations. "Our industry is changing right now, with new regulations coming between governments in the exchange of information. We must be very flexible and guide clients in finding the best solutions to help them become compliant," says Alves. "It is no longer a luxury. Clients must look for their specific and correct wealth succession planning. We help clients in the introduction to the expert professionals in this field."

Alves and his team have honed their expertise over time with extensive experience in the areas of private banking, wealth management and investment advisory in a number of major national and international banking and financial institutions.

Their ability to remain flexible and independent and avoid the conflicts of interest often at play in sales-based, incentive-driven firms, allows the team to aggressively negotiate with financial institutions on its clients' behalf so that they can present the best possible options to each client, including uncovering and avoiding any hidden costs or fees.

This unbiased approach and the firm's proven track record has earned Focus Investment Advisors a high level of trust and confidence with their growing client base. In five short years since Alves founded the firm in 2011, the company has grown from managing \$20 million in assets to managing more than \$100 million in assets.

## FOCUS INVESTMENT ADVISORS

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