NOTTINGHAM ADVISORS
ASSET MANAGEMENT

Choose an Investment Team You Can Trust

Managing portfolios takes time, especially in today's challenging marketplace. How do you begin to structure and staff an investment team? We're here to help. See why Advisors, Accounting Firms, Banks, and Corporate Trustees across the nation are turning to the Outsourced Chief Investment Officer (OCIO) solutions from Nottingham. Our highly-credentialed team delivers a range of investment strategies to help meet your client's unique goals. Let Nottingham take care of the investment details so you can focus on growing your business.

STRATEGIC

Understanding our clients is a top priority. We're large enough to balance a sophisticated catalogue of services, yet small enough to preserve a deeply personalized experience. We leverage model portfolios, real-time trading in ETFs, periodic re-balancing, tax-loss harvesting, and other strategies while considering the retention of individual securities.

INTEGRATED

We integrate with a growing list of custodians that interface with Orion, our portfolio management and trading platform. We also respect your existing operational framework for systems, reports, web access, and reporting. You focus on growing your business with a team at your side you can trust.

EXPERIENCED

You'll have immediate and ongoing access to our investment team, with six team members who hold the Chartered Financial Analyst® designation. Our research team has dedicated disciplines on domestic equities, fixed income and international areas.

TAILORED

Our OCIO team fits right into your business model. Nottingham becomes your investment back office. We can be visible or invisible, depending on your strategy and preferences, and keep YOUR branding front and center. As part of your team, we'll confer with you about strategy and asset allocation decisions just as you would with your own in-house investment department.

CONSULTATIVE

The Nottingham team will be at your side to consult on client needs, help devise a strategy, and try to help you win high net-worth opportunities. We are here to help you grow up-market and provide personalization and customization that fit your clients' needs. We can also provide guidance with client on boarding, marketing and other ongoing support.

PRACTICAL

We understand that relationships are built on a basis of trust and confidence. We are committed to a partnership that grows over time. We don't require a mass conversion of accounts to work with us. We'll help you set a strategy for current and new clients with a reasonable, clear fee structure that works for everyone.

There is a more efficient way to run your investment team. Let's talk.

716-633-3800 info@NottinghamAdvisors.com NottinghamAdvisors.com

Q2.24_NA_print_OCIO-1pg_bpas_8.5x11_final | April 30, 2024