

wealth&finance2016

alternative investment awards

TARGETING SUCCESS



We interviewed Arrow Investment Advisors CEO and Director of Investment Strategy Joseph Barrato, who provides us with a unique insight into the firm and its award winning funds.

Providing Solutions

We invited Veteran Industry Professional and Sentinel Growth Fund Management CEO Mark Varacchi to talk us through this innovative platform and how it is changing the investment landscape.

Back Office Hub

We interviewed Opportunities New Brunswick CEO Stephen Lund who provided us with a fascinating insight into the organisation and its exciting plans for the future of this dynamic region.

Investing in the Future

Gen2 Partners CEO Kyle Shin talks us through the company and the vast array of investment products it provides.

6 GEN2 PARTNERS



CASTLE HALL ALTERNATIVES

W&F 49



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**Best Open-Ended Alternative Investment Fund Manager - Luxembourg
& Best Long-Term Life Settlement Fund: Long Term Growth Fund FCP SIF**

CARLISLE MANAGEMENT COMPANY

Carlisle Management Company develops, initiates, distributes and manages yield-oriented and tax optimized investments specifically for institutional investors and financial intermediaries in the Life Settlements sector. We invited Jose Garcia to provide us with a fascinating insight into the firm, which has just been named 'Best Open-Ended Alternative Investment Fund Manager – Luxembourg & Best Long-Term Life Settlement Fund: Long Term Growth Fund FCP SIF'.

Specializing in, both, open-ended investment funds and related private equity fund transactions, Carlisle Management Company considers itself to be a holistic alternative asset manager, assuming a wide range of tasks over the entire life cycle of the investment. Since inception the firm has grown rapidly, and now represents a widely diversified investor base, ranging from multi-billion dollar institutions to the most respected private banks and investment management firms in the investment community today.

Carlisle's award-winning flagship product, the Luxembourg Life Fund, is an investment fund that acquires, trades, and manages a portfolio of U.S. based life insurance policies issued by insurance companies with an average A rating. These policies generate investment returns for the fund based on the difference between the face value of each policy and the acquisition price plus accumulated premiums at the time of mortality. The fund's open-ended structure allows investors to diversify their participation across a larger pool of life settlements while maintaining a higher liquidity profile than if they purchased them directly.

Ultimately, our dedication to our clients is always our number one priority. Whether in terms of ensuring a seamless interaction with the company, providing a proper allocation strategy or by simply creating products that meet their tax and regulatory requirements, Carlisle always operates with the best interests of our clients at heart. Many of the key evolutions over the years have been based on global investor feedback as well as

management interaction and experience in a wide array of projects. We understand our clients' key issues and needs. Variables such as regulation, transparency and structural integrity, we maintain as a top priority within our philosophy and protocols. When our clients talk about their needs, we listen very closely. This approach has served us well so far and we hope that it will provide us with exciting opportunities moving forward.



Carlisle
MANAGEMENT