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PPB Capital Partners



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The annual listing of 10 companies that are at the forefront of providing Hedge Fund solutions and transforming businesses

PPB Capital Partners Bringing Simplicity to Investing in Alternatives

In the face of an unprecedented global disruption arising from the COVID-19 pandemic, alternative investments continue to demonstrate their ability to minimize risk and deliver performance better than any other asset class. The year 2021 is likely to witness an acceleration of technological trends as the industry becomes more digitalized and socially conscious as an integral part of the economic recovery. With technology as a critical enabler for alternative managers and the service providers that support them, managers are increasingly relying on state-of-the-art front-office solutions to help achieve market-beating risk-adjusted returns and gain a competitive edge. Meanwhile, automated and integrated middle- and back-office infrastructures are designed to deliver the operating and compliance efficiencies alternative funds need to curb costs and maintain their profitability in an era of tightening fees.

However, most of the high-net-worth market remains underserved because of the lack of access to institutional-quality alternative investment managers and overpriced retail products in the market. For instance, high-net-worth investors are often excluded from the same alternative investment opportunities as an endowment or foundation.

With that premise in mind, PPB Capital Partners provides premier alternative investment solutions for the wealth advisory community to gain the same exposure as institutional investors while streamlining “middle-office” operational burdens through turnkey solutions. The company offers a platform of alternative investment funds from industry-leading managers and designs and operates feeder funds and customized fund-of-fund solutions for wealth advisory firms.

As a fiduciary, the firm works closely with wealth advisors to solve the challenges of investing in private investments.



Through extensive research and careful due diligence, PPB aligns itself with specially selected fund managers, offering unique and differentiated strategies with over 250 years of combined investment management expertise in portfolio construction, implementation, onboarding, and operations. Over the years, PPB has earned a reputation as an expert partner of the wealth management community and consistently engages in peer-to-peer and educational meetings and key conferences within the wealth management industry. “The company’s growth strategy focuses on increasing exposure to alternative investment funds that address the needs of wealth advisors and their clients, as well as helping firms manage their operational processes,” explains Lake.

PPB offers operational expertise in multiple fund structures and alternative strategies, including - private equity, private credit, private real estate, venture capital, hedge funds, impact investing, infrastructure, and direct investments, with lower investment minimums and tight cost controls. The firm serves as a niche provider in delivering alternative investment solutions that offer less red-tape and greater personalized service than other competitors’ alternative platforms.

PPB’s vertically integrated alternative platform enables users to tailor alternative fund solutions to their firm’s and clients’ needs, such as direct access to premier fund sponsors, creating a single investment feeder fund, customize fund-

of-funds, and more. Users can also receive legacy fund reporting and operational support of directly held alternative investments across numerous client accounts.

“PPB is committed to increasing exposure to both alternative strategies and premier managers that have predominantly been available to only institutional investors,” begins Brendan Lake, Founder and CEO of PPB Capital Partners. The firm streamlines processes from onboarding clients and solution implementation to reporting tax nuances and cost-controls to ensure a seamless experience for wealth advisors and their clients.

Launched in 2008 at the beginning of the recession and successfully navigating through the financial crisis, PPB understands the importance of building a highly stable business model by providing the highest level of service to wealth advisory partners. Today, with the end of the pandemic on the horizon, investors remain starved for yield and private credit strategies focusing on direct lending. PPB’s service-centered model, which is the cornerstone of the firm’s culture, enables wealth advisors to capitalize on these opportunities with niche offerings that invest in the private market.

The firm recently partnered with an industry-leading venture capital firm to provide the wealth advisor community exposure to investing in Silicon Valley-based technology companies. Through such strategic partnerships and platform of alternative investment funds, PPB is in a unique position to bring exclusive investment opportunity to wealth advisors. “Our commitment to client relationships and knowledge of the operational intricacies of alternative investments ensure that we have the resources to support wealth advisor clients,” concludes Lake. CM