

Multnomah Group Investment Process



Research Process

Step 1 - Manager Screening

Our investment analysts conduct the qualitative due diligence that we believe is crucial to the selection of an investment manager. Each asset class is assigned to one of our investment analysts.



Investment Management Team and Organization

- Firm structure and compensation model
- Roles
- Team dynamics
- Additional resources



Philosophy and Process

- Fundamental beliefs
- Structured and repeatable research process



Portfolio Construction and Risk Management

- Formulation of ideas into a portfolio that reflects the manager's stated philosophy
- Review and assess the manager risk guardrails

1. For managers that pass quantitative screening, we solicit product details through an RFI.
2. The analysts review the RFI response and schedules an interview with the candidate to determine if a product should be advanced to step 2 - Documented Due Diligence

Step 2 – Due Diligence



If the analyst believes the strategy is a good fit for our Recommend List, they will prepare an internal presentation and deliver it to our Investment Committee.

Step 3 – Discussion and Decision-making



The Investment Committee reviews the recommendation of the investment analyst and can either approve the fund to be recommended to the firm's clients, reject the fund, or request additional information and consider the fund at a future meeting.

Step 4 – Client Communication



If approved by the Investment Committee, the analyst will prepare a written Investment Brief and a recommendation presentation to make for the client. The presentation summarizes the investment due diligence process and the recommended fund for the committee to review and approve.