

# CLIENT CASE STUDY 1

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## THE CLIENT

*An entrepreneur in Rhode Island who built a \$40M family legacy in real estate*

## Challenge

- Client lacked a comprehensive view of where and why their current managers were investing
- Investment strategies overlapped due to assets spread across multiple firms
- Lack of transparency about portfolio construction decisions
- Sub-standard performance and service



The client migrated to Clarendon Private.

## Outcome

- Personalized investment policy statement
- Customized, simplified investment portfolio
- A truly diversified strategy
- One trusted relationship with a wealth manager who made the time to understand the client's unique financial picture and investment capabilities



# CLIENT CASE STUDY 2

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## THE CLIENT

*A college in New England with a \$55M endowment*

## Challenge

- Wealth manager didn't prioritize client relationship
- Sacrificed personalized service for access to top-tier investment strategies
- Infrequent communication from manager about portfolio construction decisions



The client migrated to Clarendon Private.

## Outcome

- White-glove service, including in-person meetings with a wealth manager and more frequent portfolio updates
- Top-tier investment strategies, private banking, and other wealth management services
- Customized investment portfolio
- Felt like No. 1 instead of one of many





# CLIENT CASE STUDY 3

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## THE CLIENT

*A couple in their early 40s looking to buy their dream home*

## Challenge

- Client was uncomfortable with debt and planned to fund 50% of the purchase directly from their investment portfolio
- Intended withdrawal would reduce exposure to a high-performing portfolio returning over 9%
- No coordinated advice across investments, liabilities, and overall financial goals



The client migrated to Clarendon Private.

## Outcome

- Evaluated debt strategy in context of portfolio performance and long-term financial goals
- Recommended lower down payment and favorable mortgage terms at 2.5%
- Helped client preserve capital in their portfolio and continue compounding returns
- Delivered holistic guidance across both sides of the balance sheet—investments and liabilities



# CLIENT CASE STUDY 4

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## THE CLIENT

*A business owner preparing for a liquidity event after building a company over 25 years*

## Challenge

- Client planned to sell their business within 18 months
- No succession plan—children were not interested in taking over the business
- Hadn't yet engaged in pre-sale estate planning, tax strategy, or wealth transfer conversations
- Risked missing opportunities to optimize financial outcomes before the sale



The client migrated to Clarendon Private.

## Outcome

- Proactively structured wealth transfer strategies prior to sale
- Built a long-term plan to gift assets to family in a tax-efficient manner
- Developed a post-sale investment strategy aligned with client's legacy and lifestyle goals
- Provided high-touch advisory beyond asset management—focused on the client's full financial picture

