

INSTITUTIONAL INVESTOR PROFILE

Global Wealth Management Partners LLC

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Institutional Details

LEGAL NAME

Global Wealth Management Partners LLC

JURISDICTION

Delaware, USA

ENTITY TYPE

Limited Liability Company

DATE ESTABLISHED

2015-06-15

TAX ID

98-7654321

REGULATION

SEC Registered (RIA)

ASSETS UNDER MANAGEMENT

4.8 Billion USD

COMPLIANCE STATUS

Fully Compliant

INVESTMENT PHILOSOPHY

Long-term value investing with ESG focus

Authorized Representatives

NAME	TITLE	AUTHORITY	STATUS
Robert J. Wellington III r.wellington@globalwmp.com	CIO & Managing Partner	Full Signatory	✓ Verified (Tier 3)
Elizabeth M. Vanderbilt e.vanderbilt@globalwmp.com	Dir. of Portfolio Mgmt	Investment < \$50M	✓ Verified (Tier 3)

Investment Criteria

TICKET SIZE
\$5,000,000 - \$50,000,000

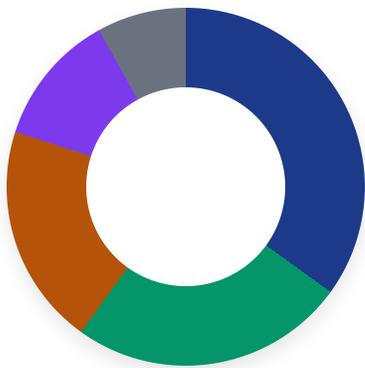
TARGET IRR
15-25%

HOLD PERIOD
3-7 Years

RISK TOLERANCE SCORE: 65/100



Current Allocation



Public Equities	35%
Private Equity	25%
Real Estate	20%
Fixed Income	12%
Other	8%

TOP HOLDINGS

ASSET NAME	TYPE	VALUE	ALLOC %
TechGrowth Fund IV	PE	\$450M	14.1%
Manhattan Office Portfolio	Real Estate	\$380M	11.9%
Global Healthcare Partners	Public Eq	\$320M	10.0%
Sustainable Infra Fund	PE	\$280M	8.8%

Historical Performance

PERIOD	ANNUAL RETURN	BENCHMARK	OUTPERFORMANCE
1 Year	18.5%	14.2%	+4.3%
3 Year	22.3%	16.1%	+6.2%
5 Year	19.8%	15.5%	+4.3%
Inception	17.2%	13.0%	+4.2%

SHARPE RATIO
1.45

SORTINO RATIO
2.10

MAX DRAWDOWN
-18.3%

Declarations

I/We hereby declare that all information provided in this profile is true, accurate, and complete. I/We understand that RealtyLync will rely on this information for partnership decisions. I/We consent to RealtyLync conducting necessary due diligence.

Authorized Signature

Robert J. Wellington III
CIO & Managing Partner

Date