TURN8
Private Wealth

TURN8 PRIVATE WEALTH

Precision. Focus. Trust. Results.

COMPANY OVERVIEW

About Us

Founded with a commitment to foster innovation and creativity on behalf of our clients, TURN8 is an independent wealth management firm that has been servicing individuals and families since 2012. Our mission is to protect and grow our clients' wealth by offering comprehensive investment solutions crafted to suit their distinct goals.

WHAT WE OFFER OUR CLIENTS

Professional Investment Management

- Customized investment portfolios according to client risk and return objectives.
- A high level of diversification paired with an active investment philosophy.
- A team of dedicated investment professionals with expertise across a wide array of markets and asset classes, including private market alternatives like private equity and real estate.
- Online reporting tools that allow clients to access their portfolio values daily.

Holistic Wealth Management

- Personalized and integrated financial advice.
- Assisting with tax and estate planning.
- Budgeting and cash flow management.

WHY CHOOSE US

- Best in class investment opportunities: Unique investment framework providing access to not just stocks and bonds but a full range of alternative asset classes including hedge funds, private equity, real estate, infrastructure and private credit. We no longer believe the traditional 60% stocks and 40% bonds portfolio sufficiently compensates investors in today's marketplace.
- High quality returns: Our unique investment approach is designed to achieve our target returns with the lowest level of risk, leading to more protection for our clients in challenging market conditions while capturing the upside when markets do well.
- A client first approach: Priority number one is our clients and making sure they feel financially comfortable today, and throughout retirement. We place an emphasis on transparency and honesty when it comes to communicating with our clients.
- Unbiased advice and client alignment: As an independent firm with operations in the US and Canada, we have the flexibility to invest in whatever we determine is best for our clients with no external pressures impacting our decisions. We invest alongside our clients.
- Efficiency: A boutique feeling with the infrastructure of a large firm. Over the years we have invested in building a strong foundation that today allows us to spend more time servicing our clients and their investments, as opposed to being bogged down with operational and administrative issues.
- An active management style: We are not your typical "buy and hold investors". While we believe in efficient markets, we aim to identify and capitalize on new opportunities as they arise and use innovative solutions to insulate client portfolios during market corrections.
- Team: When you choose to partner with TURN8, you collaborate with a professional and experienced team that seamlessly blends youthfulness with a wealth of expertise. Our dynamic approach ensures high-quality service and advice, setting us apart in an industry where numerous advisors are entering retirement.

MANAGEMENT TEAM

We are collaborative, no nonsense, and down-to-earth. This, together with our distinct approach to investing, shared values, and a culture based on the spirit of togetherness, guides us in everything we do.

Craig McFadzean
Founder and CEO

Shauna Spear
Director of Operations

Robert Havill
Director of Client Success

Conner Sura
Portfolio Manager

Shannon Blyth
Strategic Initiatives

Alec Desjardins
Investment Analyst

Emma Robb
Administrative Assistant

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