

CAPITAL COUNSEL

Best Independent Investment Management 2019 - New York

With a long history of investing success, Capital Counsel is a highly regarded, independent investment management firm based in New York City. Having recognised the firm in this year's Wealth & Money Management Awards we provide an insight into how far it has come over the past two decades.

Established in 1999 by F Randall Smith, Terence Greene, James Magid, and Lauren Blum, Capital Counsel draws on their expertise to provide clients with the quality investment management they need to create the lifestyle they want to achieve.

Together, the firm's experienced team manages concentrated portfolios of large-cap and mid-cap

companies based in the U.S., or those with large U.S. operations. They use their knowledge, expertise and fundamental valuation-based investment process to identify exceptional businesses that are led by capable and experienced managers. These managers work to leave the business better than it was when they started.

As a long-term investor, Capital Counsel continuously examines the businesses whose shares it owns for clients to ensure that the managements successfully strengthen the execution of their business plans, which includes modifying them as market conditions change. Over the years since the firm first began, it has cumulatively outperformed the S&P 500, with reduced risk, showcasing the success of its disciplined approach to investment management and delivering good results for clients in both up and down markets.

Capital Counsel works with a diverse range of discerning investors, who are high-net-worth individuals and their families, foundations, and endowments. The source of the net worth for many of the firm's valued clients is ownership in successful businesses. Some are former executives of public companies whose shares were held in Capital Counsel's clients' portfolios. They have become clients because they understand and respect the firm's investment process, and know that their money is in safe and capable hands when they rely on this experienced, professional firm.

Currently, the firm has assets under management of approximately \$1.8 billion. Looking ahead, the Capital Counsel team will be seeking to enhance this already impressive portfolio to meet the ever-evolving needs of its current and future investors. Ultimately, Capital Counsel's careful investment approach and dedication to client service has been central to the firm's success over the past 20 years. These factors will help to propel the firm to even greater success over the coming two decades and beyond.



The Partners at Capital Counsel. From left to right, Justin Berrie, Terence Greene, Lauren Blum, F Randall Smith and Pauline Meehan

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