

CAPRIN SNAPSHOT

knowledge preserves wealth



WHY WE DO IT

CApital **PR**eservation and **IN**come: our firm's guiding principles define our investment solutions and drive our disciplined, strategic process to help investors meet their preservation and income goals. With approximately \$1.3 billion in client accounts (6.30.18), our firm provides high quality fixed income portfolios to individuals, family offices, corporations, endowments, foundations and governmental entities and delivers a superior relationship experience to our advisors and clients.

CAPRIN ADVANTAGE

Income Emphasis with a Capital Preservation Foundation
Proactive Forward Looking Investment Management
Responsive to Client Investment Goals with Innovative Solutions
Dedicated Expertise With a Relationship Centric Approach

WHO WE ARE

We are a Boutique Firm. 100% Employee owned and headquartered in Richmond, Virginia. Because of our size and culture, we promote full-time access to key decision makers and executives. A firm with decades of proven results, we provide clients with multiple solutions for achieving their fixed income goals.

SEPARATELY MANAGED ACCOUNTS (SMAs)

Intermediate Maturity Municipal – State Specific
Intermediate Maturity Municipal – National
Short Maturity Municipal – National Only
Intermediate Maturity Taxable Bond
Low Duration Taxable Bond

ETF MODELS

Muni Plus ETF
Core Plus ETF
Opportunity Plus ETF

Caprin's SMAs and ETF Model Strategies are offered on several investment platforms sponsored by financial advisory firms and turn-key asset management providers (TAMPs). Fees and minimums vary by platform, and then by size of the account.

Founded in 1997, Caprin is an asset management firm that applies the substantial experience and expertise of its professionals to the creation and management of forward-looking investment solutions for those seeking wealth preservation and income generation

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Past Performance does not guarantee future results.
Minimum Investment may differ depending on platform availability/restrictions.