Intera Capital Partners

SPECIALIZED INVESTMENT SOLUTIONS

Intera Capital Partners is an industry-leading asset management placement firm. We seek out and represent innovative investment offerings, market-leading structured insurance, and benefit finance solutions to improve investment capital and risk-adjusted returns.

SERVING INSTITUTIONAL INVESTMENT LEADERS

We've been in your chair as CFOs and senior advisors. We know the complexity of your role, and we deliver clarity through investment solutions designed with an insider's perspective.



THE INTERA ADVANTAGE

CUSTOMIZED SOLUTIONS
Bespoke investment strategies rooted in deep industry expertise.

PARTNERSHIP APPROACH
We collaborate with our industry-leading market partners to meet the unique objectives of each client.

EFFICIENT ACCESS
A vetted pipeline of innovative and compelling investment opportunities.

CLIENT-FOCUSED, MENU-BASED SOLUTIONS

INSURANCE & BENEFIT FINANCE

Insurance Company-Owned Life Insurance (ICOLI)

- GA & SA Diagnostic Reviews and Remediation
- Favorable Tax Treatment
- Attractive RBC Treatment
- Open Architecture, Bespoke Structure
- Combine with MMPE IDF for even greater impact

Bank-Owned Life Insurance (BOLI)

- GA & SA Diagnostic Reviews and Remediation
- BOLI 1035 Exchanges
- New GA BOLI Placement
- New SA BOLI Placement

Nonqualified Deferred Compensation Plans and Long-Term Incentive Plans

- Strategic Executive Incentive & Retention
- Executive Comp Consulting

PRIVATE MARKETS & REAL ESTATE

Limited Capacity Small & Middle Market Private Equity IDF

- Strong Performance Track Record
- Premier Middle Market Private Equity Funds
- Deep Insurance Company Investment Experience

Real Estate Loan Offering for Insurance Investors

- Transitional Commercial and Residential - Across the U.S.
- Asset class diversification
- Ease of administration
- Short duration
- Highly experienced team

IMPACT & SUSTAINABLE INVESTING

Impact Investing | Affordable Housing ETF

Driving new mortgage capital into underserved communities in the U.S.

- SVO-Identified Bond ETF
- NAIC A.1 Rating
- Available as a Bespoke SMA

Supporting U.S. Agriculture Through Innovative Investing

- Real Estate Finance
- CM1-Rated Ag Loans

Institutional Architects
CONTERRA Financing American Agriculture
iBorrow
TwinBridge Capital Partners
Sit Investment Associates
CCM Community Capital Management

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Intera
Capital Partners



Jim Roberts
President/Founder

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Jim is a seasoned finance industry professional with an extensive background and experience working directly with institutional investors, commercial banks, insurance companies, and the institutional investment consulting community. Before founding Intera Capital Partners, Jim was Managing Director of Institutional Sales at RBC Global Asset Management and served as CFO of Marquette Bank Minneapolis.



Joan Skallman
Program Manager, Marketing Strategist

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Joan is an accomplished business development & integration professional with 20+ years of experience leading growth initiatives, advancing strategic partnerships, and executing enterprise expansion strategies. Prior to joining Intera, Joan held senior leadership roles at Nexgen HBM, a national business development, marketing, and SaaS technology firm serving the mortgage, real estate, and fintech industries.

The
POWER OF ONE
MARKET-LEADING
TEAM

UNRIVALED
EXPERIENCE AND
EXPERTISE

> *We are proud to partner with exceptionally experienced firms in delivering market-leading investment and benefit structures to meet your specific goals and objectives.*
>
> Jim Roberts

INSTITUTIONAL ARCHITECTS
Consult | Design | Implement

Justin Gladieux, MBA, CEPA, Co-founder and Managing Partner

A recognized leader in the manufacturing, distribution, and placement of life insurance products built for the institutional marketplace. Justin specializes in the design and implementation of executive benefit plans, business succession and retention strategies, and corporate asset strategies using life insurance.

Michael Ori, Co-founder and Managing Partner

Specializing in the audit, design, implementation, administration and funding of executive benefit plans for Institutional Architects' corporate clients.

Jake Bosacki, JD, FSRI, Co-founder and Managing Partner

An expert in the organization, development, implementation, and maintenance of executive compensation and benefit strategies that restore, reward and retain top talent.