



A market leader in providing **tailored investment and structured insurance solutions** to institutional investors and corporations.

As a partnership-focused asset management placement firm, **we seek out and represent innovative and unique** investment offerings, market-leading structured insurance, and benefit finance solutions to help our clients achieve superior long-term financial results.

WE SERVE

- Insurance Companies and Commercial Banks.
- Institutional Investors and Corporations.
- Investment Executives.
- Our market partners in delivering their full capabilities.



THE INTERA ADVANTAGE

- Efficient access to a vetted pipeline of investment opportunities.
- Insight into new or niche strategies.
- A trusted, client-focused and consultative approach, based on innovation and expertise.
- **We've been in your chair;** we understand the complexity of your role and the investment decision-making process.

COMPELLING PARTNER OFFERINGS | CLIENT FOCUSED | MENU-BASED SOLUTIONS

Insurance Company-Owned Life Insurance (ICOLI)

- Fund Employee Benefit Obligations
- Favorable Tax Treatment
- Attractive RBC Treatment
- Open Architecture, Bespoke Structure
- Combine with MMPE IDF for even greater impact

Bank-Owned Life Insurance (BOLI)

- BOLI 1035 Exchanges
- New GA BOLI Placement
- New SA BOLI Placement
- GA & SA Diagnostic Reviews and Remediation
- Bond-BOLI Level-Up Trade

Lifetime Income Non-Qualified Solutions (LINQS+)

- Low-cost Lifetime Benefits for Key Talent
- Executive Comp Consulting

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 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
- CMI-Rated Ag Loans



Institutional Architects



Sit Investment
Associates



TWINBRIDGE
CAPITAL PARTNERS



COMMUNITY CAPITAL
MANAGEMENT



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Jim Roberts
President/Founder

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.

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Todd Hedtke
Senior Advisor &
Client Consultant

Todd brings a unique blend of over three decades of investment experience and more than fifteen years of executive-level leadership to our team. His broad-based expertise spans strategic planning, insurance, fixed income, investments, contract negotiation, P&L management, portfolio management, risk assessment, business development, economic asset management, fiduciary oversight, and governance.

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Joan Skallman
Program Manager &
Marketing Strategist

Joan is an accomplished business development professional with 20+ years of experience managing and implementing company expansion initiatives. Prior to joining Intera, she served in various leadership roles while helping to build a national business development, marketing, and SaaS technology company supporting the residential mortgage, real estate, and fintech industries.

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The
POWER OF ONE
MARKET-LEADING
TEAM

UNRIVALED
EXPERIENCE AND
EXPERTISE

“We are proud to partner with an exceptionally experienced team to deliver market-leading 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.