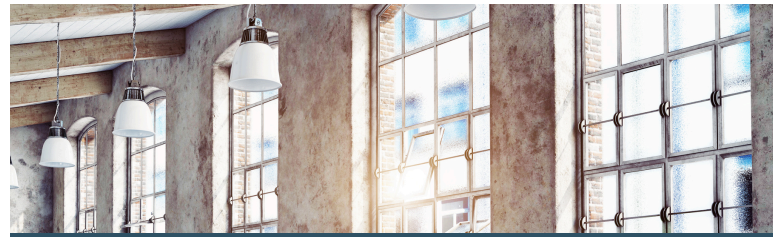


A market leader in providing tailored investment and structured insurance solutions to institutional investors and corporations.

As a partnership-focused, third-party marketing 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 focus on building strong, collaborative relationships and approach our work through client-focused thought leadership and innovation, bringing unrivaled experience and expertise to your team.



WHO WE SERVE

- Insurance Companies and Commercial Banks
- Institutional Investors and Corporations
- Market Partners; in delivering their full capabilities.
- Investment Executives; we've been in your chair and understand the complexity of your role.

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
- CM1-Rated Ag Loans





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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jroberts@interacapital.com



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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Joanie Skallman
Program Manager &
Marketing Strategist

Joanie 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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INSTITUTIONAL ARCHITECTS

Consult | Design | Implement

Proud to partner with an exceptionally experienced team to deliver market-leading benefit structures to meet your specific goals and objectives.