



# STRATEGIC PARTNERSHIPS

Performance-  
Only Alignment

Institutional  
Pedigree

Purposeful  
Scarcity

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# The Pillars of Our Network

At Deseret Point Partners, we believe that the highest level of investment management requires more than just internal expertise—it requires an ecosystem. To serve our clients' complex needs, we have meticulously curated a network of strategic partnerships with the world's most formidable financial institutions and specialized technology providers.

## Institutional Custody and Asset Protection

The security of client assets is our primary mandate. We partner with Charles Schwab, a titan of the financial industry with over \$9 trillion in client assets. This relationship ensures that your capital is held by a globally recognized, "too big to fail" institution.

- Investment Custodian: Secure, third-party holding of all client assets.
- Strategic Financing: Access to institutional-grade liquidity and negotiated margin loans.
- Trading Infrastructure: A robust, high-frequency execution platform that ensures efficiency in every transaction.

## World-Class Investment Management

We leverage the scale of the world's leading asset managers to provide our clients with institutional pricing and elite-level market insights.

- Vanguard: We utilize the massive scale of Vanguard to access low-cost index funds, ensuring that our clients benefit from the same economies of scale as the world's largest pension funds.
- State Street Global Advisors (SSGA): We partner with State Street, one of the world's largest asset managers and a "Global Systemically Important Financial Institution" (G-SIFI), to access specialized fund structures and liquidity.

- Goldman Sachs: Our investment committee integrates Goldman Sachs Global Investment Research, providing our team with the same data-driven insights used by the world's most sophisticated sovereign wealth funds.

### **The Deseret Point Advantage: Scale Without Compromise**

By integrating these institutions into our workflow, Deseret Point Partners provides a "best-of-both-worlds" experience. Our clients receive the personalized attention of a boutique firm, backed by the unstoppable force of global financial leaders.

We don't just manage wealth; we orchestrate a global network of experts to protect and grow it.

## **Apply for Private Client Status**

We are crafting the world we want to live in. We work with individuals whose goals are not in conflict with our own. Whether you are building toward your first million or protecting your fiftieth, we invite you to see if you fit within the 45.

Begin the application [here](#).

