Carter Family Office

Managed Trading Accounts Overview

Strategic Market Access with Institutional Execution

V1.3

◆ Introduction

At Carter Family Office, we are not spectators—we are active investors, traders, and capital allocators with decades of experience across private markets, property, structured finance, and global trading. Our evolution has been driven by a single truth:

In today's climate, capital cannot afford to sit idle—and access to real performance is increasingly reserved for the few.

As yields tighten, inflation persists, and volatility becomes the new normal, the ability to achieve intelligent, risk-aware returns has never been more valuable—or more difficult to source with trust.

Managed trading accounts form a vital solution for **clients seeking strong alternative yield**, efficient **use of sidelined funds**, and access to **liquidity-aware strategies**. At their core, these accounts prioritise **client control**, **real-time transparency**, and institutional execution—without requiring clients to relinquish ownership or oversight.

This document sits between our broader capital growth framework and the more focused strategies such as Managed FX, offering a concise overview before deeper engagement.

◆ What Are Managed Trading Accounts?

Managed trading accounts allow clients to retain control and ownership of their funds while engaging with seasoned, institutional-grade trading teams. These are not pooled funds or retail-level offerings. Instead, they represent:

- **Segregated Account Structures**
  Client funds are professionally traded but never co-mingled.
- **Discretionary Execution by Proven Teams**
  Strategies are managed day-to-day by vetted traders with live performance and institutional methods.
- **Clear Parameters and Transparency**
  Read-only dashboards, capped risk exposure, and defined expectations.

This is a rare opportunity to access **the level of discipline, transparency, and professionalism normally reserved for funds and institutions**—without giving up ownership or vision.

🔷 Our Experience & Why It Matters

We do not simply introduce others—we deploy our own capital.

Whether in property, alternative assets, or high-frequency trading strategies, our experience has always informed our approach.
We have worked closely with hedge funds, algorithmic traders, crypto-native investment teams, and global macro strategists to understand what separates signal from noise.

Because of this, we know exactly what to look for—and who to avoid.

This experience is what allows us to open doors for our clients—doors that are otherwise closed or obscured by complexity, opacity, or inflated marketing.

When we align with a manager or trading group, it's because we've seen them perform, we understand their methodology, and in many cases, we've been capital participants ourselves.

🔷 Strategy Types We Facilitate

We provide access to a range of discretionary managed account strategies across:

- **FX-Centric Models**
  Institutional currency trading with capital preservation focus and capped drawdowns.
- **Multi-Asset Strategies**
  Including commodities, indices, and dynamic macro models—designed for structured yield.
- **Crypto Hedge Fund Accounts**
  Professionally managed digital asset strategies with optional algorithmic execution and hedging overlays.
- **Capital-Protected or Tiered Performance Accounts**
  For clients prioritising capital security without sacrificing all upside.
- **Short-Cycle, Rollable Access**
  Weekly and monthly account structures designed for liquidity-aware capital.

Each manager or provider operates under strict onboarding and reporting procedures. We only introduce clients where both parties are aligned in values, trust, and capital expectations.

🔷 Designed for This Market

Gone are the days of set-and-forget. Capital today needs to move strategically to stay ahead of inflation and market distortion. Yet accessing true institutional strategy has never been harder:

- Most platforms are opaque, gated, or broker-led.
- Retail access is flooded with marketing, not management.
- Trust, discretion, and relationship are often missing.

Carter Family Office bridges that gap.

We facilitate access to real, risk-aware strategies that prioritise **yield**, **capital flexibility**, and **sustainability** over hype and promises. And we do so with a fundamental principle in mind:

If we wouldn't allocate our own capital—we would not consider such avenues.

🔷 Capital Requirements & Onboarding

Minimum entry points typically begin at **£50,000**, with bespoke models or institutional accounts requiring **£1M+**.

Onboarding involves:

- A short discovery process
- Capital profile submission
- Connection to the relevant provider
- Live or read-only reporting based on structure
- Ongoing access through our platform

All introductions are subject to discretionary acceptance by both parties.

🔷 Our Role

Carter Family Office is not an advisor, broker, or regulated trader.
We are a private family office deploying our own capital, aligning with trusted market participants, and extending access where there is **mutual alignment, trust, and readiness**.

We do not pool funds or promote open platforms. Every relationship is considered individually and facilitated based on suitability—not sales.

🔷 Submit Your Interest

If you're an eligible capital holder, institutional contact, or strategic introducer and would like to explore managed account access, we invite you to begin the process below:

→ **Submit Your Interest**

Once submitted, our team will review and respond with the most relevant next steps for onboarding.
