Carter Family Office

Our Perspective: What We Look For

V1.3

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At Carter Family Office, we sit in a unique position — as direct investors ourselves, and as facilitators for other families, offices, high net worth individuals, and institutions seeking access to high-conviction, risk-conscious opportunities.

Because of this dual role, we approach every opportunity with two lenses:

1. As Investors Ourselves

We evaluate opportunities with our own capital at stake. That means we're not chasing brochure gloss or passing fads. We're focused on what endures — structures with downside protection, asymmetric upside, and real-world applicability.

Here's what we prioritise:

- Proven strategies with real edge — whether through access, structuring, or execution.
- Demonstrable risk control — not just theory, but how the downside is managed in live environments.
- Credible teams — operators and principals who've navigated storms, not just built decks.
- Strategic alignment — models that make sense *today*, not last year.
- Skin in the game — we back those who are materially invested themselves, just as we are.

2. As Stewards for Other Families and Clients

When facilitating capital deployment or building bespoke access points for our clients, we apply the same rigour. Every opportunity must meet our own internal investment filter before we ever put it forward externally.

Our facilitation work focuses on:

- **Fit** — We don't push products. We match opportunities to objectives, timelines, and risk appetite.
- **Transparency** — Our clients know how a deal works, where it fits in their portfolio, and who's behind it.
- **Alignment** — We work best with counterparties who understand long-term relationships. That's our bias — not transactions, but trust.
- **Control** — Whether we co-invest or build custom wrappers, we maintain governance and oversight that reflects family office standards.

Ultimately, our approach is simple: if it's not good enough for our own capital, it's not good enough for our clients. And when we find exceptional opportunities, we're not just introducing — we're participating.

Who We Are and What We Do

- We are a private family office with direct investment interests and a selective, trusted network of aligned capital partners.
- We facilitate and deploy capital across public and private markets, with a strong bias towards risk-managed, real-world strategies.
- We specialise in high-conviction alternative investments — including managed FX, hard asset monetisation, credit enhancement, and structured growth platforms.
- We can act as both principal and facilitator — co-investing alongside families, institutions, and trusted clients.
- We design access points that meet private capital needs: feeder funds, SPVs, structured notes, or bespoke wrappers.
- We move in timing-sensitive windows — identifying dislocations, inefficiencies, and off-market opportunities before they become mainstream.

- We prioritise capital protection while pursuing market-beating yield — particularly in an environment shaped by inflation, currency debasement, and systemic fragility.
- We maintain a strong operational backbone — from banking structures and execution to tax, planning, and governance support.
- Above all, we value trust, selectivity, and long-term alignment — with every opportunity and every relationship.

What We Look For

Our filters are simple but exacting — whether we're deploying our own capital or opening the door for others, every opportunity must demonstrate:

- **Real substance** — a grounded, scalable model rooted in real demand or dislocation.
- **Clear edge** — access, timing, or execution that gives the strategy a meaningful advantage.
- **Disciplined risk control** — defined downside, managed exposure, and exit clarity.
- **Alignment across stakeholders** — we back operators and partners who are materially involved and think long-term.
- **Capital efficiency** — structures that deliver strong risk-adjusted returns without unnecessary complexity.
- **Transparency and governance** — clear reporting, open dialogue, and institutional-quality infrastructure.
- **Value creation** — more than just returns — we look for opportunities that create lasting value across cycles.
- **Strategic timing** — we're looking for entries that make sense *now*, not based on outdated assumptions.
- **Relational integrity** — we favour partners and counterparties who understand that capital is personal — because for us, it is.
- **Resilience in today's climate** — a meaningful response to inflation, erosion of fiat value, and shifting global flows.

Above all, we are a private, single family office, focussed on building real-world and market beating solutions for both ourselves and our esteemed clients.