Overview

Chapwood Investments, LLC is an independent investment firm that specializes in providing personalized investment solutions to its clients. Founded in 2005 by Ed Butowsky, Chapwood Investments has built a reputation for its analytical and objective approach to investing.

Our philosophy is focused on reducing risk while increasing returns using diverse strategies that consider purchasing power and other crucial factors that are usually not considered by most firms. At the heart of our company are **two** key divisions: *Investment Forensics and Asset Management.* These divisions work together to help us analyze investments objectively, and then manage our clients' portfolios accordingly. In other words, we use a data-driven approach to *"look before we leap"* to help our clients achieve their financial goals.

Chapwood Investments stands out as a stellar option for investors seeking a meticulous and unbiased approach to investing. With our unparalleled commitment to personalized service and transparent pricing, Chapwood offers a truly exceptional investment experience.

- **Clear Explanations** – Simple and easy-to-understand explanations of your investment portfolio, including how your investments work together, and what you need to know to make informed decisions.
- **Expertise** – With over *30 years* of experience in the industry, our founder Ed Butowsky and our team of experts possess the necessary knowledge and expertise to provide you with the best investment advice and guidance.
- **Expectation of Returns** – We will work with you to determine your financial goals and needs while providing you with clear expectations of what you can expect from your investments.
- **Monthly Reviews** – Up-to-date check-ins with your investments' performance and investment strategy on a monthly basis, ensuring you are always informed about the progress of your portfolio.
- **Alternative Options** – Diversification in private equity, venture capital, and other top alternatives, offering you a wider range of investment opportunities.
- **Stay Informed** – We offer weekly updates on events that affect the market, ensuring you are always informed and up-to-date on the latest market trends.
- **Client Service** – Our team provides highly personalized and attentive client relations, ensuring that your individual needs and concerns are always taken care of.
- **Access to:**
  - Your portfolio, view of returns
  - Research from various sources
  - Trusted connections in various other fields (CPA, Attorney, etc.)

Ed Butowsky, Managing Partner

- His more than 30 years in the financial services industry began at Morgan Stanley, where he was a senior vice president in private wealth management.
- Featured on Fox News, ESPN, Sports Illustrated, and various other platforms, Ed has advised several high-net-worth individuals and families.
- A respected member of the Greater Dallas community, Ed lives with his wife and 2 children in Plano, Texas.

Asset Management

We narrow down our investment options by only considering assets with a track record of at least 10 years. Then, we use a top-down approach to select investments based on broader market trends and economic factors. We are an independent firm, so we are not limited in our investment selection.

Here's a simple look at our Asset Management process for our clients:

Investment Screening → Investment Recommendations → Implementation + Monitoring

Investment Forensics

As part of our objective approach with Investment Forensics, we use the **8 Metrics** to determine the quality of a portfolio.

1. Rate of Return
2. Standard Deviation
3. Variance Drag Phantom Tax
4. Sharpe Ratio
5. Probability of Loss in the Next 12 Months
6. Amount of Money at Risk in the Next 12 Months
7. Upper and Lower Return
8. Correlation to the S&P 500

At Chapwood, we employ various analytical tools beyond the basic metrics to identify the most optimal and objective portfolio.

- **Chaptimizer** A tool unlike any other designed to pinpoint the historic rate of return and standard deviation and create a portfolio from the data
- **ChapVest** Aims to help find if what someone has is what they need through true cost analysis.
- **CHIP Score** Metric to simply measure the performance of a portfolio with purchasing power included
- **Financial Distress Calculator** Created for clients to assess whether they are financially prepared for retirement.
- **Investment Reality Check** Similar to the PEPSI test, tests for efficiency of portfolios
- **Portfolio Analyzer** Provides a clear outlook on your portfolio's efficiency
- **Portfolio Builder** Calculator designed to compute your portfolio's 8 Metrics
- **Portfolio Enhancer** Before and after comparison of how an investment shift could change one's portfolio

…and more!