Making It All Work **Together**

Watch this replay on the FS MVP Private Markets Fund for Qualified Clients*

Duncan Advisor Resources and FS Investments are proud to present this topic with guest speaker Dan Wilk, Executive Director and Client Portfolio Manager.

FS MVP Private Markets Fund seeks to generate long-term capital appreciation by investing in a diversified portfolio of private market investments, with a focus on investments in midsized companies in the United States.

This special webinar will educate you on this strategy and how to incorporate it into your existing allocation.

When thinking about potential clients, consider the following:

- Timely opportunity to take cash off the sidelines
- A story/idea that is resonating with business owners and high net worth clients/prospects
- The potential for better returns with less volatility and beta to public equities

Paperwork Requirements

Cambridge does require the MVP Subscription Agreement and Alternative Investment form. If the funding for the investment is coming from Pershing or NFS, the Custodian requires a form to be submitted to issue the funds. These forms are can all be done via DocuSign within the Cambridge Knowledge center. If you need assistance finding these documents in this system, please reach out to Greg Hicks

Pershing Private Investment Form
Request for Transaction NFS

*Qualified Clients are defined as having $1.1 million invested with you OR greater than $2.2 million in net invested assets (NIA)

Your presenter for the webinar:

Daniel Wilk, CAIA
Executive Director & Client Portfolio Manager
FS Investment

Biography

Sincerely,

Thomas Block, AAMS AWMA CRPC
Associate Director of Business Development
Duncan Advisor Resources
W 800.517.9901 x2232
Text 804.376.8649
www.duncanar.com/joinDAR

Duncan ADVISOR RESOURCES
Making It All Work Together

Duncan Advisor Resources | Duncanar.com

Duncan Advisor Resources | 311 Main Street | Irwin, PA 15642 US