EDITOR'S NOTE

INVESTMENTS & WEALTH MONITOR

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Bruce Stewart provide their insights with, frequent contributors—Scott Welch and Editorial advisory board members—and Portfolio Construction."

"Private Markets: Asset Allocation and incorporate private markets with my article, for the Future™”; and I focus on how to Everything: Building Your Client’s ‘Portfolio to Increasing Allocations.” Aaron Filbeck, 2021 Survey Shows Advisors Are Open investing, and communicating the merits of alternative investments with clients; and then Daniil Shapiro provides guidance with his summary article, “Igniting Alternative Investments: Cerulli Associates and Daniil Shapiro’s insightful article, “Alternative Investments: 2021 Survey Shows Advisors Are Open to Increasing Allocations.” Aaron Filbeck, a frequent contributor, then provides his own perspective with “Rethinking Everything: Building Your Client’s ‘Portfolio for the Future’”; and I focus on how to incorporate private markets with my article, “Private Markets: Asset Allocation and Portfolio Construction.”

Editorial advisory board members—and frequent contributors—Scott Welch and Bruce Stewart provide their insights with, respectively, “Performing Due Diligence on Alternative Investment Managers” and “Demonstrating Hedge Fund Utility: Maintaining Mathematical Civility.” Kathryn Kaminski and Yingshan Zhao delve into “Quantifying Turbulence in Trend Following.” We tackle the growing interest in cryptocurrencies with two provocative articles, Keith Black’s “Valuation Models and Due Diligence: Cryptocurrencies and Digital Assets” and Pierre Debru’s “A New Asset Class: Investing in the Digital Asset Ecosystem.”

To close out our issue, Steve Horan and Brian Ullsperger join me in a far-reaching Q&A aimed at understanding, incorporating, and communicating the merits of alternative investments with clients; and then Daniil Shapiro provides guidance with his summary article, “Igniting Alternative Investments: Alternative Investment Managers Must Match Attractive Strategies with Liquidity and Performance.”

As always, please feel free to share your suggestions for topics and authors for future issues with IWI Editorial Director Debbie Nochlin and me.

Anthony B. Davidow, CIMA®
Chair, Investments & Wealth Monitor Editorial Advisory Board

EDITORIAL CALENDAR

SEPTEMBER/OCTOBER 2022 [EDITORIAL FOCUS]
Private Wealth

NOVEMBER/DECEMBER 2022 [EDITORIAL FOCUS]
Longevity Risk

JANUARY/FEBRUARY 2023 [EDITORIAL FOCUS]
Economy and Geopolitics