



Investment Research Partners, a sub-advisor for Compass Investments, is an independent research provider and asset manager focused on developing and supporting a broad array of purpose-driven investment solutions.

Firm Background

Investment Research Partners has decades of collective experience working on behalf of clients. That experience helps the firm to better understand the challenges and opportunities investors face today and informs the range of solutions delivered to clients.

- Established in 2019, the firm is a SEC registered investment advisor
- Owners Martin Wildy, Geoff Caber, Brett Greenfield, and Stuart Feinzig are long-tenured financial professionals with experience managing wealth for individual clients
- Based in Lemont, PA, the firm acts as a sub-advisor to the Boston Team

While the firm was established in 2019, the roots of the company go back more than a decade. The owners worked together in different capacities while at previous firms and focused on delivering high-touch service with a boutique investment firm experience for clients. The opportunity to not just recreate, but to improve upon that experience was one of the primary drivers of the company being founded.

Solutions

Investment Research Partners offers a broad array of investment management solutions across a range of risk profiles to Boston Team clients. Solutions include portfolios geared for clients in different life stages and those interested in integrating values-based criteria such as sustainability and faith into their portfolios.

Investment Solutions Include:

- Total Return Portfolios
- Income-Oriented Portfolios
- Sustainable & Responsible Portfolios
- Faith-Based Portfolios

These portfolios are created using a wide variety of security types, including, but not limited to individual stocks and bonds, preferred stocks, mutual funds, closed-end funds, and or exchange traded funds. In addition, customized portfolio solutions are available for Boston Team clients when



appropriate. For example, clients with highly appreciated assets in taxable accounts may require flexibility not available in model-based solutions.

Investment Philosophy & Process

There are some constants in the Investment Research Partners philosophy and investment approach regardless of investment solution selected. The firm believes portfolios should be concentrated in high conviction ideas in a thoughtfully risk-managed way. Individual stock portfolios are constructed with a focus on valuation and balance sheet health relative to peers. Additionally, the team seeks to maintain adequate diversification and to understand the potential downside for each investment in an effort to minimize unintended portfolio risks. Individual bonds are selected based on client need, credit quality, and liquidity. Fund investments are selected based on a combination of items such as portfolio fit, expense structure, investment process, investment team, and embedded expenses.

Lastly, the partners believe that a compelling investment solution is one that can continually adapt to an ever-changing investment landscape. As a result, the investment team meets on a regular basis to review current macro conditions, asset class valuations, investment selection, and implementation.

Learn More

The Boston Team welcomes the opportunity to speak with people interested in learning more. Please visit the Boston Team website (<https://compassinvestmentsllc.com/advisors/boston/>) and utilize the *Contact Us* section to start a discussion today. You can also learn more about Investment Research Partners by visiting www.investmentresearchpartners.com.

The Boston Team

Stuart Feinzig, Senior Relationship Manager
Geoffrey Caber, Investment Advisor
Martin Wildy, CFA, Sub-advisor Representative

All investments are subject to loss. Please contact Compass Investments, LLC if you are interested in learning more or if you would like the disclosure documents for either Compass Investments or Investment Research Partners, LLC.

Geoff Caber is dually registered as an Investment Adviser Representative affiliated with Compass Investments, LLC and Investment Research Partners LLC. Martin Wildy and Brett Greenfield are registered as Investment Adviser Representatives affiliated with Investment Research Partners, LLC. Investment Research Partners, LLC has been contracted by Compass Investments, LLC to provide sub-advisory services to Compass Investments, LLC. Neither Mr. Wildy nor Mr. Greenfield is an Investment Adviser Representative of Compass Investments, LLC.