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Attracting Clients | **Concentrated Positions**

Cocktail Parties, Concentrated Positions and the CAR Framework

By: Holly Swan | April 24, 2024

Let's say you meet someone at a cocktail party who, upon hearing what you do for a living, confides they don't know what to do with a highly appreciated concentrated stock position. How can you respond to lay the groundwork for a potential follow-up conversation? Use the CAR framework: Celebrate. Ask. Remind.

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Holly Swan
Executive Director
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Concentrated Positions

Solve the Concentration Conundrum with Exchange Funds

By: Holly Swan | February 14, 2024

Investing in a single stock or concentrated position is both exciting and risky—offering the potential for substantial returns while simultaneously exposing investors to significant volatility. Therein lies the conundrum of concentrated positions.

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