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Q Describe your firm, its offerings and its mission.

SCS Financial Services, LLC is a registered investment advisor located in Boston that manages approximately \$7.5 billion in assets. Founded in 2002, we manage assets for family offices, high net worth individuals, registered investment advisors, endowments, foundations, insurance companies, and sovereign wealth funds. We emphasize partnering with our clients and delivering superior investment results. Our team is comprised of experienced investors with considerable global security and market experience.

Q Describe your investment strategy and how it might be unique.

We aim to provide equity like returns with bond like volatility. Our portfolios are constructed to give exposure to a variety of strategies that have enticing risk/reward trade-offs. We find unique managers before the peak of their life cycle that generate alpha; we avoid funds at the end of their cycle where asset gathering trumps performance.

Q Describe how your investment products fit into a well-rounded asset allocation strategy.

We look to meaningfully outperform our peers by offering maximum expected return with minimal risk. Given the 'new normal' of greater uncertainty in the markets, a portfolio that includes an allocation to a well-constructed fund of hedge funds along with traditional equity/bond allocation will have

steadier returns over time than one with more volatility, creating an "All Weather Portfolio."

Q How has your firm adapted during the recent economic downturn?

Our funds historically have outperformed in economic downturns. Our proactive risk management systems provide a "risk budget" for each manager, ensuring that we understand how their portfolio will perform in multiple market scenarios. We model the aggregate risk exposure for the portfolio, and may deploy index option overlays to reduce net exposure if warranted.

AT A GLANCE

Firm name: SCS Financial

Principals: 7

Employees: 52

Location: Boston, MA

Years in business: 9

Assets under management: \$7.8 billion as a firm; \$1.6 billion specifically in hedge fund of funds

Minimum investment: \$25,000 in our registered fund, SCS Hedged Opportunities; \$1,000,000 in our qualified funds, SCS Capital Partners & SCS Opportunities Fund, Ltd.