

SIP America

STRUCTURED INVESTMENT PRODUCTS

ONE STAMFORD PLAZA, 263 TRESSER BOULEVARD, 9TH FL, STAMFORD, CT 06901
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Q Describe your firm, its offerings and its mission.

SIP America is an affiliate of the SIP Nordic Group (headquartered in Stockholm, Sweden). SIP America and the SIP Nordic Group are known for their marketing and education efforts in the Structured Investment Products (SIPs) area. We have a focus on advisors, with Investment Consultants positioned across the country. At SIP America, we combine global product expertise with local client knowledge to provide financial professionals with Structured Investment solutions that are customized for their client base.

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

Structured products as a product class are still relatively new to many advisors. Additionally, we are unique as a distributor in our efforts to focus exclusively on structured investment solutions rather than attempting to service multiple products.

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

Structured investment products are a flexible product class that enable advisors to implement many customizable features (i.e. underlyings, tenor, protection levels, leverage, etc.) in their routine asset allocation efforts.

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

We have remained relatively lean while continuing our commitment to education and providing consultative investment professionals in the field.

AT A GLANCE

Firm name: SIP America
Principals: Brian Jones
Employees: 11
Location: Stamford, CT
Years in business: 1
Assets under management: NA
Minimum investment: NA