Investment Funds: Client Service

Exceptional client service is a hallmark of DRA. We maintain open communication through both formal and informal channels, including timely and comprehensive quarterly reports. Further, we are happy to create custom reports to meet client information needs on a one-time or ongoing basis.

Annually, we meet in-person with the members of the Investor Advisory Committee for each of our funds. During these meetings, we present to our investors the performance of the funds and each of their investments in detail, discuss market trends and investment strategies, and update our performance projections. Beyond these annual meetings, clients are encouraged to have open communications with any member of DRA at any time questions or concerns arise.

Because we are managers who have been on "your side of the desk", we know our clients' fiduciary concerns and view our investors as partners in our business.