

Diversify away from Stocks, Bonds and Real Estate and still get equity-like returns without gut-wrenching volatility

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-- Alpha Wealth Funds plans a January launch of innovative and potentially groundbreaking non-correlated diversified fund of funds. Stocks,

Bonds and Real Estate are at an all-time high. This creates challenges for investors according to Mark Kress CFA®, the portfolio manager and creator of Alpha Diversified Fund. Kress points out, "Investors are rightfully nervous about putting money to work. Yet, there is a select group of fund managers that I have identified that can navigate these challenging market environments."

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I built a portfolio management process to mix and match over 100 of these extraordinary managers in such a way that I could offset the risk of individual funds.”

Mark Kress



[Kress has created Alpha Diversified Fund for High-Net-Worth investors](#) to diversify their exposure away from Stocks, Bonds and Real Estate, but still get equity-like returns without the gut-wrenching volatility.

Mark goes on to say, "I have spent the last 8 years conducting due diligence on some of the most talented money managers in the country. I built a portfolio

management process to mix and match over 100 of these extraordinary managers in such a way that I could offset the risk of individual funds." As an example, he pointed out that in March of 2020, during the onset of the Covid pandemic, the stock market recorded two of its worst days in history ending the month down over 12% while the portfolio of funds I created was in the black that month.

Many of these fund managers however are not accessible to the average investor. These funds have delivered exceptional returns by remaining small and nimble. They have limited capital raising in order to execute their unique strategies that are often capacity constrained.

Mark emphasized that these are not new funds. Most have a 3 to 5 year track record and have been managing their strategies with exceptional results. [An important differentiator according to Kress](#) is that the funds need to be niche enough for sustained competitive advantage. The funds must be operationally sound with vetted and proven accountants, fund administrators, and custodians.

Mark brings decades of portfolio and risk management experience to manage asset allocation and hedge fund portfolios for family offices to maximize risk-adjusted returns. He has consulted with both multi and single-family offices on sourcing alternative investments and portfolio management solutions. From 2001-2011 Mark was a Portfolio and Risk Manager for the global team at Guggenheim Investments where he helped manage \$1bn in long/short, market neutral, and long-only equity strategies. Mark holds a BS in Managerial Economics from the University of California at Davis, an MBA from the University of California at Berkeley Haas School of Business, and is a Chartered Financial Analyst®.



Mark Kress



Park City Utah's Best Investment Firm

Alpha Wealth Funds is an investment advisory firm, based in Park City, Utah. They were recently chosen by readers of the local newspaper, Park Record, as The Best Investment Firm in 2021. Their website at www.alphawealthfunds.com provides information about their boutique hedge funds, separately managed accounts, financial planning, estate & trust services, private placements, and in-house concierge services for high net worth individuals, families, and businesses. Its flagship fund, The Insiders Fund has been recognized nationally as one of the top performing long-short equity funds in the country. Since 2010 they have been shredding the S&P 500 and the finest snow on earth.

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