

# Gideon Strategic Partners Engages Lumenai to Manage Quantitative AI-driven Investment Strategies for Gideon's Clients

*Gideon Strategic Partners announced today that it engaged Lumenai Investments, an AI-driven investment manager, to offer customizable portfolios to GSP clients.*

LOS ANGELES, CALIFORNIA, USA, July 1, 2024 /EINPresswire.com/ -- [Gideon Strategic Partners \(GSP\)](#), a premier wealth management firm, announced today that it will engage [Lumenai Investments](#), a quantitative and AI-based investing and reporting manager, to offer customizable, alpha-seeking separately managed portfolios to GSP clients.



GSP designs tax-efficient financial plans and life insurance around the unique needs of high-net-worth individuals. Its investment strategies focus on asset allocation and private equity, and it uses an exclusive range of alternative and passive investment products to construct tax-aware portfolios designed for maximum return with minimum risk.

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Innovation is one of Gideon's core values, so naturally, we would add AI-driven funds to help meet our clients' personalized needs and goals.”

*Robert Amoruso, CEO & Founder of Gideon Strategic Partners*

Lumenai is one of the first firms to offer AI-powered investment management in the US. It strives to deliver custom, index-beating portfolios that generate positive alpha without taking excess risk. Lumenai actively managed portfolios provide a unique and complementary addition to GSP's existing suite of investment solutions.

GSP will now offer its clients AI-powered, alpha-seeking strategies created and managed by Lumenai:

1) Gideon GO Quality Strategy – Multi-asset portfolio emphasizing quality stocks and bonds, credit, commodities, and cash with systematic tax loss harvesting.

2) Gideon GO Dividends Strategy – Multi-asset portfolio emphasizing dividend stocks and bonds, credit, commodities, and cash with systematic tax loss harvesting.

3) Lumenai Innovation Fund – Market-neutral fund seeking 8%-12% net returns and an additional 4-8% in realized tax credits, exhibiting low correlations to markets and aggressive tax loss harvesting of longs and shorts.



“Innovation is one of Gideon’s core values, so naturally, we would add AI-driven funds to help meet our clients’ personalized needs and goals. AI will be a game-changer for investing and Lumenai makes it easy for us to bring it to our clients. They bring a rare track record of quant and AI investing, and working with them requires a minimal time commitment and no need for additional expertise, staff, or technology,” said Robert Amoruso, CEO & Founder of Gideon Strategic Partners.

“We’re pleased to be partnering with Gideon. We believe that we add a valuable addition to their investment offering and that we’ll help them perform better for their clients and contribute to the firm’s ability to scale and grow,” said John Bailey, Founder and CEO of Lumenai.

## About Gideon Strategic Partners

Gideon Strategic Partners is a leading wealth management firm dedicated to providing innovative financial solutions and advisory services. With a commitment to integrity, excellence, and client success, Gideon Strategic Partners stands at the forefront of wealth management.

## Gideon Strategic Partners Contact

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## About Lumenai

Lumenai is an outsourced quantitative and AI-powered investing and reporting manager who

wants to make active investing effortless for financial professionals. Its investment process is powered by ETS Asset Management Factory, a research and advisory firm that has specialized in quantitative and AI investing since 1987.

## Lumenai Contact

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## DISCLOSURE

Investors should consider the investment objectives, horizons, and income tax brackets, risks, charges, and expenses of any variable product carefully before investing. This and other information about the investment company is contained in each fund's offering memorandum, which can be obtained by emailing [info@gideonsp.com](mailto:info@gideonsp.com). Please read it carefully before you invest. By accepting these materials, the recipient agrees to keep the materials and their content confidential and not to use them or the content for any purpose other than to evaluate a financial transaction with Gideon Strategic Partners, LLC of the type described in the materials, except that there is no limitation on the disclosure of the tad treatment or tax structure of the products and transaction structures contained herein. Any unauthorized use or disclosure of these materials without Gideon Strategic Partners, LLC's written consent is prohibited. Securities are offered through The Leaders Group, Inc. Gideon Strategic Partners is independently owned and operated. "Securities and Investment Advisory Services offered through The Leaders Group, Inc. Securities Dealer, Member FINRA/SIPC; TLG Advisors, Inc. Registered Investment Advisor; 26 W Dry Creek Circle, Suite 800, Littleton, CO 80120. 303-797-9080. Gideon Strategic Partners is not affiliated with The Leaders Group, Inc. or TLG Advisors, Inc.

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