



## CASE STUDY

### Extraordinary Service for Extraordinary Clients

*Real-life event. Client name has been changed.*

#### **The background.**

Like many who discover Naples Global Advisors (NGA), Sam was referred to us by someone who understood that the sophisticated investment approach and personalized service we provide was just what Sam needed to prepare for the future. The President of a S&P 500 company, Sam had accumulated a significant level of wealth with concentrations in his company's stock but was now positioning for retirement. Diversifying risk and planning for the transfer of wealth to his children one day were top priorities.

Initially Sam was impressed by our different approach to investment management. We take the time to evaluate our client's holdings, understand their goals, and customize a portfolio tailored around legacy holdings to achieve those goals. Our management fee is based solely on the assets we manage and does not rely on selling additional products, nor does it fluctuate based on an hourly billing rate for our time.

While those were the initial reasons that compelled him to engage Naples Global Advisors, it did not take long for Sam to realize that with his NGA team, he had gained far more than investment advice. Introductions were made to Sam's adult children and soon he and his entire family gained trusted confidants and friends.

The relationships we build are an integral part of NGA's internal culture. Our clients become like family. And when one family member is in trouble, the others spring into action.

#### **Disaster strikes.**

On September 28, 2022, Hurricane Ian set its sights on the Southwest Florida coast and the Category 4 storm hit our area in Naples with a vengeance. Like many who live seasonally along the coastline, Sam and his family, were still north for the summer months. Through the media, all eyes around the country watched



### Proactive Response to Natural Disaster

*Going the extra mile  
on our clients' behalf.*



**We can have outstanding portfolio results, but that is not the story that our clients are going to share with their friends. That is so transitory. But this level of service is impactful and meaningful, and that is what they will remember and share. It is the ultimate referral and the reason why I am so proud to be a part of this team."**

*Greg S. Debski, CFA  
Principal and Portfolio Manager*

the devastation from a distance as waters rose to unprecedented levels, and homes were destroyed by the floods.

But not everyone was watching from afar. Sheltering safely further inland at his home in Naples was Sam's NGA representative. As he witnessed the historical events unfold, one of his first thoughts was protecting his affected clients, including Sam.

Instinctively, he knew that Sam's home had likely endured significant damage and would probably be uninhabitable. He immediately began anticipating the needs that even Sam was not yet aware of.

For example, our NGA representative knew that Sam would want to return to Naples to oversee construction repairs, but he would need a place to stay. As soon as cellular service was restored, he immediately helped secure a home rental for Sam before rental prices skyrocketed and available properties became nonexistent.

"Being here on the ground, these were obvious problems to me that I knew our clients didn't think of," recalls NGA Principal and Portfolio Manager, Greg S. Debski, CFA. "If I had waited until Sam asked, it would've been too late. It was an easy problem for me to anticipate and fix, which is the approach we take with all our clients. If we can help reduce stress for our clients, make their life easier, or prevent them from being in tough situations, that's what we do."

### **The ultimate level of trust.**

Sam's in-home office was located on the first floor of his home in Naples, which had been inundated with flood waters from the storm surge. In that office was every important document that Sam owned: bank records, brokerage statements, and more. Sam was still safely evacuated thousands of miles away, and he knew that construction contractors would soon be arriving at his home to assess the damage. He

also knew that without power in the area, his security cameras would not be functioning.

Sam and his wife have developed strong ties in the Naples community and are surrounded by a network of friends and business associates. But in this time of dire need, who did Sam turn to when he needed someone trustworthy enough to access his home and retrieve his most important documents? Naples Global Advisors.

The next day his NGA team was in Sam's home packing up all his sensitive documents. To ensure the contents remained safe until Sam returned, the boxes were securely stored in NGA's offices.

"When our clients can turn to us in their time of need, it is a great feeling to know that we are doing a good job," shares NGA's Debski. "We can have outstanding portfolio results, but that is not the story that our clients are going to share with their friends. That is so transitory. But this level of service is impactful and meaningful, and that is what they will remember and share. It is the ultimate referral and the reason why I am so proud to be a part of this team."

### **About Naples Global Advisors**

Founded in 2011, Naples Global Advisors is an SEC Registered Investment Advisor serving individuals, families, trusts, retirement plans, and charitable foundations and endowments. As an employee-owned LLC, we operate as a fiduciary and manage clients' portfolios with transparency and accountability. Whether you have an established portfolio or are investing as a result of a life event, our team is consistently seeking ways to put the odds of investment success in our clients' favor.

