

# PAM

PRIVATE ASSET  
MANAGEMENT

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## TOP NEWS STORIES

### Q&A: TIGER 21'S MICHAEL SONNENFELDT

Explaining how and why peer-to-peer networking actually works

**TURN TO P5**

### BREAKFAST BRIEFING

The panel tackles women and wealth

**TURN TO P4**

**+  
PLUS**

### AMG WEALTH PARTNERS APPOINTS PRESIDENT

Affiliates Managers Group, Inc taps John Copeland III as president of newly formed subsidiary, AMG Wealth Partners

**TURN TO P4**

### MFO LAUNCHES SILVER BRIDGE INSTITUTE

Boston-based advisor launches educational organization

**TURN TO P6**

## ASK THE EXPERTS

In our new feature, subscribers and readers of *PAM* can write in with questions or problems plaguing their wealth management practices and will receive practical advice from top experts in return. To submit a question, email Managing Editor, Kristen Oliveri at [k.oliveri@pageantmedia.com](mailto:k.oliveri@pageantmedia.com).

**Q** I have an executive personal assistant who is fantastic at her job but has acted inappropriately. How can I set boundaries without embarrassing her or myself?

**A** Teresa Leigh, Household Risk Management

Executive personal assistants are privy to the intimate lives of their employers. It is imperative at the beginning of the working relationship to set professional boundaries in an objective, non-emotional manner.

1. Company policy: have a written sexual harassment policy and distribute to each employee. The policy should identify what is inappropriate behavior. An in-service class with a video is a good way to address and

identify problematic behavioral issues.

2. Be smart; don't place yourself in a compromising situation. Do not socialize with your PA outside of work and avoid being alone with them after normal working hours. Should your PA make a suggestive comment try to ignore it and change the subject.

3. Enlist the assistance of an objective third party mediator. The mediator can address the PA's behavior on behalf of the employer in such a way to salvage the working relationship while avoiding an embarrassing confrontation. If the inappropriate behavior continues, terminating employment may be the only option. No one wants to find themselves on the wrong side of a sexual harassment suit. ■

For more info, go to <http://www.teresaleigh.com>



## COMMENT

### Emerging managers vs established managers



Ronen Schwartzman, founder and CEO of Ten Capital Advisors, looks at the various challenges and benefits of investing in start-up hedge funds