

Focus Investment Advisors, A Miami-Based Advisory Firm, Is Featured in 'Business in Focus' Magazine

In the Article, Founder Marcelo Castro Alves Discussed the Flexible, Client-Centric Business Model of His Company, Which Is a Two-Time Five Star Miami Wealth Manager Nominee

In *Business in Focus'* August 2016 issue, Marcelo Castro Alves, founder of [Focus Investment Advisors](#), discussed how he grew his company to its current state of managing over \$120 million in assets since its inception in 2011. His boutique independent advisory company specializes in serving European and Latin American clients with offshore solutions.

The article, which can be read [here](#), details Focus Investment Advisors' commitment to providing worldwide solutions and client-focused, unbiased advice by maintaining the flexibility to thrive in a quickly evolving environment. This has allowed Focus to continue to grow following the recent wave of complex changes to regulatory obligations.

Alves discussed the ways that technology has connected our world and accelerated the pace of global initiatives like tax transparency, regulations, and market volatility.

“Nothing will ever be the same again. Transparency and data sharing are unavoidable, and for the offshore private wealth advisors, the only answer is transparency and tax efficient, compliant solutions.” To consult an independent wealth and estate planning advisor “is no longer a luxury; it has become a necessity!” continued Alves.

Specifically, the Panama Papers incident is putting more pressure on global regulations and standards to ensure greater transparency and mitigate offshore tax avoidance, AML regulations, and Cybersecurity obligations. Offshore private wealth advisors must have fluent international regulatory knowledge. With rising costs of compliance, many advisors prefer to retire rather than adapt to new regulations.

Alves told *Business in Focus* that his company, a 2016 Five Star Miami Wealth Manager nominee (first nominated in 2012), will be selective with clients to ensure adaptability.

To remain flexible, the firm is outsourcing with compliance companies and others who understand regulations, while focusing on offering client solutions and developing other businesses.

For instance, Alves informed the magazine that Focus Investment Advisors has collaborated with a company specialized in setting up real estate fund structures to help their clients find yield, diversify their investment portfolios, and steer through volatile markets.

“We brought this fund into play to help our clients as a way to diversify their portfolios. It's intended to optimize the risk-return trade-off,” Alves said of the company's new real estate fund.

Focus has also expanded its services to provide asset protection solutions through an affiliated insurance agency.

While bankers and broker-dealers have their own incentives and targets to meet, Focus Investment Advisors is an advisory firm that does not sell products and focuses solely on the needs of their clients, Alves explained in the article.

“To offer flexible solutions for the client, that’s the most important thing.”

About Marcelo Castro Alves:

Marcelo Castro Alves founded Focus Investment Advisors in 2011. Prior to that, Marcelo was an independent advisor for three years with another Miami group. Before that, Marcelo Castro Alves was at a major private bank in Miami and in the Global Private Client Division in Switzerland, primarily managing investment portfolios for high net worth individuals, private foundations, and small to mid-size corporations. For more information, please visit www.focusinvest.net.

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