



PORTFOLIO DETOX: REGAIN CONTROL OF YOUR WEALTH

By Goltsblat Capital | Independent
Investment Advisory

THE PROBLEM

MOST UHNW INVESTORS TODAY UNKNOWINGLY:

- Overpay **1–3% annually** in hidden fees and layered commissions
- Hold portfolios with **no coherent strategy**—a mess of banker sales pitches, overlapping funds, and style drift
- Are exposed to **market downside** with **no true risk plan**
- Receive advice that's **conflicted, opaque, and incentivized to extract**, not protect

If your portfolio has been shaped by multiple private banks, legacy advisors, or various intermediaries—there's a 90% chance you are **leaking serious capital**.



THE SOLUTION: A CLEAN, INDEPENDENT PORTFOLIO DETOX

WE OFFER A ONE-TIME, HIGH-TRUST CONFIDENTIAL ENGAGEMENT TO:

- Audit your current portfolio holdings, structures, fees, and exposures
- Identify **hidden risks, redundant positions, and non-transparent charges**
- **We will help negotiate better rates on your behalf, whilst preserving the relationship**
- Deliver **a clean, actionable repositioning strategy** tailored to your risk profile, jurisdictional setup, and long-term goals
- Coordinate with your existing legal, tax, or custody teams if needed
- **Create a consolidated NAV tracking file** across all holdings, with regular updates delivered for full transparency and control
- No product sales. No brokerage. **Just intelligent, unconflicted guidance.**



**100%
INDEPENDENT**

**NO
PRODUCT
SALES**

**NO
HIDDEN
COMMISSIONS**

**YOU
REMAIN IN
CONTROL**