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Fidelis Capital Partners with Domain Capital Group to Add Timber Assets to Alternative Investment Portfolio

Alliance will provide Fidelis Capital clients with direct, actively-managed exposure to the domestic timber markets

(DALLAS, TX — June 12, 2023) — Fidelis Capital is committed to providing clients with direct and cost-efficient access to opportunities typically available only to the largest institutional investors. As trusted fiduciaries, the firm diligently seeks top-tier management teams specializing in a range of investment sectors. Toward that objective, Fidelis Capital has entered into a strategic partnership with Domain Capital Group, which will allow their clients direct access to domestic timber investments.

“For the right client, timber is a wonderful addition to a diversified portfolio,” said Neale Ellis, Co-Chief Investment Officer at Fidelis Capital. “I have worked with members of the Domain team for many years and think timber is an important asset class. It is low correlating, offering stability, a decent yield, tax efficiency, good returns, and inflation hedging, all in an investment that promotes sustainability.”

“Domain Timber Advisors and Fidelis’ founders have a successful history of working together to address high-net-worth investors’ needs,” said Joe Sanderson, Managing Director and CEO of Domain Timber Advisors. “The partnership allows us to provide customized investment strategies and valuable insights about the many benefits of adding alternative investments, such as timber, to a portfolio. We look forward to working closely with Neale and his team to help serve their clients.”

Domain Timber Advisors, a subsidiary of Domain Capital Group, LLC, employs a well-defined, active timberland investment strategy, focused on the acquisition, management, and disposition of properties, which typically meet a certain set of criteria, including:

- Smaller, non-contiguous properties, generally in the 2,000 to 30,000 acre range.
- Significant biological growth and income potential.
- Diversified by geography, botanical species, and age to reduce risk and enhance liquidity.
- Potential for value creation from an active, opportunistic, and sustainable management regime.
- Investments in markets with strong or growing demand.

“We feel this partnership is an important step for Fidelis Capital,” Ellis continued. “For most of our clients, managing risk is as important as returns, so we spend time seeking out ways to lower risk. We also believe that meaningful investment opportunities exist outside stocks and bonds and specifically within these non-correlated asset classes. Fidelis manages risk allocations that span both public and private investments, including private equity, private debt, real estate, farm, timberland, minerals, currencies, and crypto.”

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It is also worth noting that a significant amount of the world's wealth is held in real assets. In fact, the largest and most sophisticated managers of sovereign wealth funds, foundations, and endowments, have long recognized the benefits of allocating a significant portion of their portfolios to real assets for a number of reasons.

Real assets tend to be more stable than financial holdings, can function as an inflationary hedge, and provide a return stream that typically behaves differently than stocks and bonds. (Timberland has an especially low correlation, as most of the returns derive from biologic growth.) Thus, real assets tend to improve the efficiency of the overall portfolio by enhancing risk-adjusted returns over time. Direct investment in underlying assets or resources is highly effective as it reduces layered fees and allows for a more targeted approach when customizing an overall wealth plan.

Within the real asset class, timber assets hold a particular appeal. Timber is in demand as a natural resource and as an asset class, lending itself to growing and preserving wealth across generations.



About Fidelis Capital

Fidelis Capital is a wealth management firm that provides a true private banking experience. Founded by former private bankers from Wells Fargo and Bank of America, Fidelis Capital is the first wealth management firm started by principals from rival institutions. Based in both Tampa, Florida, and Dallas, Texas, Fidelis Capital serves as a multi-family office for ultra-high net worth families. For more information, visit <https://www.fideliscapital.com>.

About Domain Capital Group

Atlanta-based Domain Capital Group, LLC provides comprehensive private investment management services, through its registered investment adviser subsidiaries, to institutions, public and private pensions, corporations, foundations, endowments and high-net-worth individuals. Domain Capital Group's investment professionals are experienced across a diverse range of asset classes and investment strategies, including real estate, natural resources, media, entertainment, technology, credit, and other financial services. As of December 31, 2022, Domain managed approximately \$8.4 billion in total assets through its two registered subsidiaries, Domain Capital Advisors, LLC and Domain Timber Advisors, LLC. The assets are comprised of approximately \$7.4 billion in real estate, debt, alternative, and other assets constituting Regulatory Assets Under Management ("RAUM") and approximately \$1.0 billion in non-RAUM which includes real properties and additional loans serviced. Please refer to each firm's Form ADV for additional details. For more information, visit domaincapitalgroup.com.